IBM SPSS Data Collection Interviewer Server 6.0.1 User's Guide

Note: Before using this information and the product it supports, read the general information under Notices on p. 338.

This edition applies to IBM SPSS Data Collection Interviewer Server 6.0.1 and to all subsequent releases and modifications until otherwise indicated in new editions.

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Preface

Welcome to the *IBM® SPSS® Data Collection Interviewer Server 6.0.1 User's Guide*. This guide provides information on using the IBM® SPSS® Data Collection Interviewer Server application and activities. For information about installing the products, see the *Interviewer Server 6.0.1 User's Guide*.

Adobe Portable Document Format (*.pdf*) versions of the guides are available on the *IBM SPSS Data Collection Server* DVD-ROM. Viewing and printing the documents requires Adobe Reader. If necessary, you can download it at no cost from *www.adobe.com*. Use the Adobe Reader online Help for answers to your questions regarding viewing and navigating the documents.

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Chapter

1

IBM SPSS Data Collection Interviewer Server User's Guide

Welcome to the IBM SPSS Data Collection Interviewer Server User's Guide

This User's Guide describes how to use IBM® SPSS® Data Collection Interviewer Server and its associated applications to build and run Web-based interviewing questionnaires. It consists of the following sections:

IBM SPSS Data Collection Interviewer Server Activities in IBM SPSS Data Collection Interviewer Server Administration	Describes how to use the various activities that Interviewer Server makes available through IBM® SPSS® Data Collection Interviewer Server Administration. The description of each activity is based on the online help that is available by clicking on the activity's Help button, but it will often provide additional background information, pictures, or links to other sections of the User's Guide.
Desktop Tools	Describes programs that are not part of Interviewer Server Administration, but that are available from your desktop, either as shortcuts in the Start menu or as commands that you can run from the command line.

What's New in IBM SPSS Data Collection Interviewer Server Activities 6.0.1

Support for reserved names and keywords in metadata. IBM® SPSS® Data Collection now provides full support for SQL and mrScript reserved names and keywords in metadata variables. In previous releases, the use of reserved SQL keywords could cause issues when using the IBM® SPSS® Data Collection Data Model to query data for processes such as DMOM; the use of reserved mrScript keywords could cause syntax errors when referenced within a routing script.

Refer to the *Reserved Keywords* and *Keyword Summary* topics in the IBM® SPSS® Data Collection Developer Library for more information.

Export Data. The activity has been updated to support the following new features.

- You can calculate and then generate two extra data columns that contain the start and finish times for each case. The start and finish times are based on the selected time zone of your choosing. For more information, see the topic Exporting Data on p. 262.
- You can include only records that relate to a specific filter condition (such as time period or survey status). Export Data provides several filters that you can modify to suit your requirements. You can also create your own filters, or delete filters that are no longer needed.

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These new features are supported via the new Set Filters dialog. For more information, see the topic Edit Preset Filters dialog on p. 265.

- You can choose to export data gathered before or after a specific date/time, or select a date/time range. For more information, see the topic Exporting Data on p. 262.
- The Export Data advanced dialog includes a new Connection Properties tab that allows you to provide inputs for custom properties, allowing you to define the mr Init Custom portion of both the input and output connection strings. For more information, see the topic Advanced Options on p. 267.

Launch. The activity includes the following enhancements:

- You can now define the expiration date and time (UTC time) for each project, prior to activation. For more information, see the topic Project Information on p. 109.

Phone. The activity includes the following enhancements:

- You can now filter phone reports on a project's sample information or data, in addition to filtering by date and time. For more information, see the topic Filtering Reports on p. 256.
- You can now specify a date and time range when working with date filters. For more information, see the topic Running Reports on p. 253.
- You can now specify a report's data source with the Table property in DPM Explorer (Site > Servers > [ServerName] > Applications > CatiReports-> [Report] > Table). The Table property is not set for sample base reports; the sample table is used as the default. For call history based reports, the default is set as dbo.<ProjectName>_SampleOverview_Inner.
- There is a new *Sample Usage Across Projects* report that shows a frequency table of the number of participant records in each queue, across projects, for each project. For more information, see the topic Phone on p. 230.

Phone Surveys. You can now specify answering machine detection settings on the Dialer Settings tab. For more information, see the topic Autodialer Settings on p. 159.

x64 64-bit support. x64 64-bit editions are now provided for the Data Collection applications (note that IBM® SPSS® Data Collection Author Server Edition and IBM® SPSS® Data Collection Survey Reporter Server Edition are only provided as x86 32-bit). Refer to the appropriate Data Collection installation guide for more information.

Fix pack and hotfix information. You can now view information regarding which fix packs and hotfixes are installed via the application's Help menu.
Help > About Data Collection... > Details...

What's New Information for Previous Releases

What's New information for previous Data Collection\Dimensions releases can be found in the Data Collection\Dimensions What's New document.

The document is in Adobe Portable Document Format (*.pdf*) Viewing and printing the document requires Adobe Reader. If necessary, you can download it at no cost from *www.adobe.com*. Use the Adobe Reader online Help for answers to your questions regarding viewing and navigating the document.

IBM SPSS Data Collection Interviewer Server in Other Languages

You can display the application in a language other than English. You can change the language at any time by following the appropriate instructions below. Close the application before making these changes. You can change the language back to English at any time or even switch back and forth between supported languages.

To change the display language

1. Open Internet Explorer and select:
   Tools > Internet Options
2. Click the Languages button and select the appropriate language from the Language Preference list. If the desired language does not display in the list, click Add... and select the language in the Add Language dialog.
3. Use the Move up and Move down buttons to control the language order preference. The language at the top of the list will be used as the default language.
4. Click OK to save your changes.

Converting Version 2.3 Scripts to Work With IBM SPSS Data Collection Interviewer Server 6.0.1

The system architecture and the scripting language for IBM® SPSS® Data Collection Interviewer Server 6.0.1 are completely different to those of earlier versions, and you will not normally be able to use version 2.3 projects directly with version 6.0.1.

Export Data, Survey Results, Status, and IBM SPSS Data Collection Survey Tabulation Activities

You can use these activities on existing IBM® SPSS® Quancept™ projects even if you do not have IBM® SPSS® Data Collection Interviewer Server with Quancept Support installed.

Questionnaires created with Build

To use these questionnaires with Interviewer Server 6.0.1, do the following:

- Open the project using Edit Project and, on the Properties tab, change the value of the InterviewScriptType property from Quancept to IBM® SPSS® Data Collection.
- Click the Add Application link above the project properties frame.

  In the Select application dialog box, choose Interviewer Server (Data Collection) from the drop-down list. This adds a set of Data Collection project properties to the project.

  Click OK to save your changes and close Edit Project.
- Open the questionnaire in Build and replace any version 2.3 templates with corresponding version 6.0.1 templates.

- Reactivate the project.
- If you have IBM® SPSS® Data Collection Base Professional installed you can convert version 2.3 templates to version 6.0.1 by running the HTML Tidy tool on them. See "Validating an Interview Template File" in the Base Professional section of *IBM® SPSS® Data Collection Developer Library* for details.

IBM SPSS Data Collection Interviewer Server Activities in IBM SPSS Data Collection Interviewer Server Administration

IBM® SPSS® Data Collection Interviewer Server activities are activities that you can run from IBM® SPSS® Data Collection Interviewer Server Administration when you have Interviewer Server installed. They are as follows:

Design Activities

- Build for defining a questionnaire.
- View Survey Link. This activity simply displays a message box listing URLs for running live and test interviews. Select the test link to test your questionnaire. This opens a new browser window and runs an interview in the same way that a respondent would run an interview. There is no menu bar and no online help

Manage Activities

- Launch for preparing projects for interviewing.
- Promote Project for activating a project from one cluster to another.
- Participants for loading participant records into the participant database.
- Participant Rules for editing Sample Management scripts.
- Email for sending email messages to respondents.
- Phone Surveys for defining parameters required for telephone interviewing.
- Review Interviews for reviewing telephone interviews after they have finished.
- Interviewer Monitoring for real-time monitoring of telephone interviewers. This activity is available from the Phone menu.
- Dialer Administration for using autodialers with your telephone interviewing projects. This activity is available from the Phone menu.
- Quotas for checking quotas and changing quota targets.
- Manage Logs for viewing and downloading Interviewer Server log files. This activity is available from the Tools menu.
- IBM SPSS Data Collection Remote Administration for monitoring remote interviewers.

Data Collection Activities

- Phone Participants for conducting telephone interviews.
- Export Data for exporting interview data in a variety of formats.

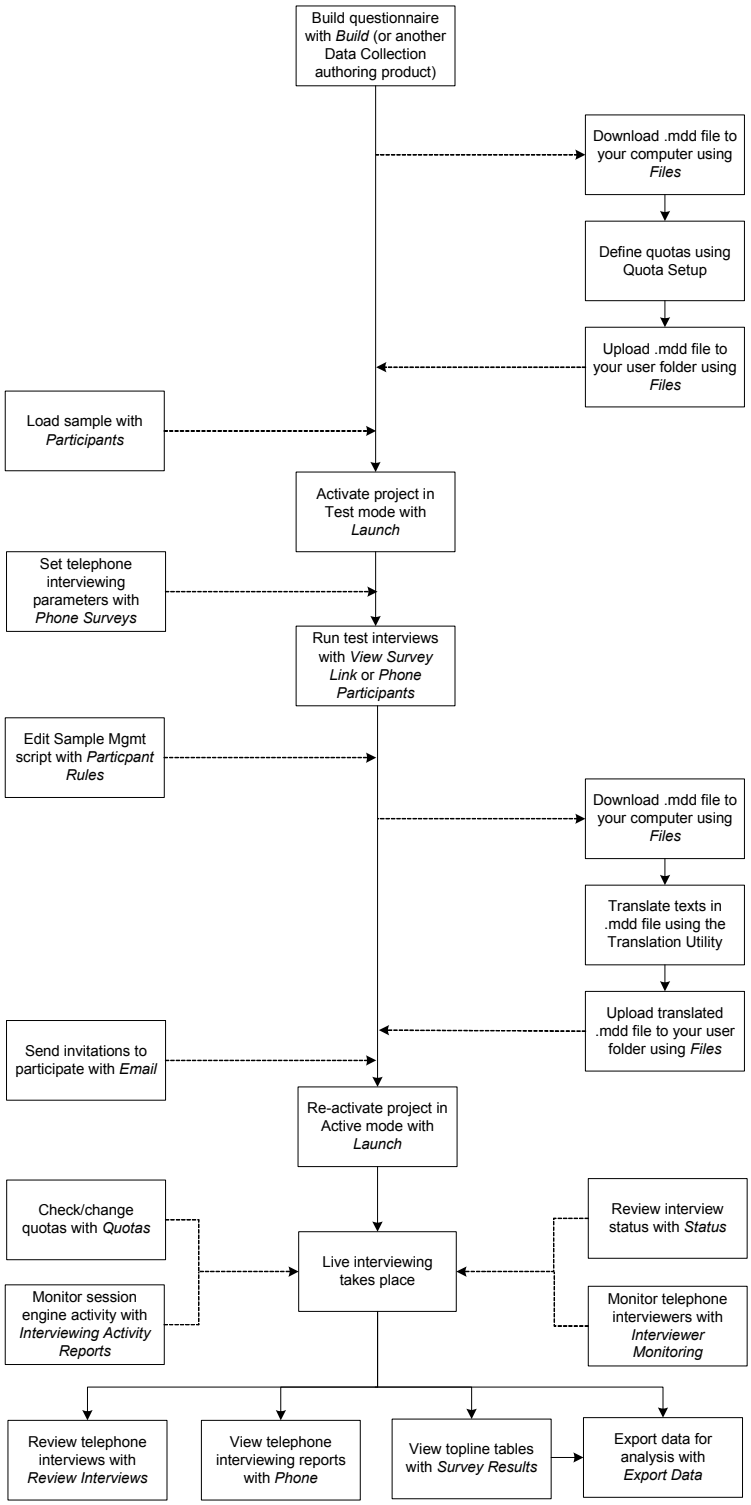
Reports Activities

- Survey Results for generating topline tables using interview data.
- Status for monitoring a project's interviewing status.
- Phone for running reports on telephone projects.
- Interviewing Activity Reports for monitoring activity on interviewer session engines. This activity is available from the Reports menu.
- Activation History for monitoring project activation status. The activity provides options for viewing pending and completed activations and creating activation history filters. This activity is available from the Reports menu.

Getting Started with the IBM SPSS Data Collection Interviewer Server Activities

With so many activities available in IBM® SPSS® Data Collection Interviewer Server Administration, it can be difficult knowing where to start or knowing in what order to use the activities. The flowchart shown here outlines a suggested workflow.

Figure 1-1
IBM SPSS Data Collection Interviewer Server Activities Flowchart


Build questionnaire with *Build* (or another Data Collection authoring product)
Download .mdd file to your computer using *Files*
Define quotas using Quota Setup
Upload .mdd file to your user folder using *Files*
Load sample with *Participants*
Activate project in Test mode with *Launch*
Set telephone interviewing parameters with *Phone Surveys*
Run test interviews with *View Survey Link* or *Phone Participants*
Edit Sample Mgmt script with *Particpant Rules*
Download .mdd file to your computer using *Files*
Translate texts in .mdd file using the Translation Utility
Upload translated .mdd file to your user folder using *Files*
Send invitations to participate with *Email*
Re-activate project in Active mode with *Launch*
Check/change quotas with *Quotas*
Monitor session engine activity with *Interviewing Activity Reports*
Live interviewing takes place
Review interview status with *Status*
Monitor telephone interviewers with *Interviewer Monitoring*
Review telephone interviews with *Review Interviews*
View telephone interviewing reports with *Phone*
View topline tables with *Survey Results*
Export data for analysis with *Export Data*

The usual path from creating a questionnaire through to analyzing the data is as follows:

- **Build the questionnaire.** Create the questionnaire using the Build activity in Interviewer Server Administration. Alternatively, you can use IBM® SPSS® Data Collection Base Professional or IBM® SPSS® Data Collection Author to create the questionnaire.
- **Define quotas.** If the project uses Quota Control, you will need to define the quota targets for each quota controlled category. You use the desktop IBM® SPSS® Data Collection Quota Setup activity to do this. This activity creates an *.mqd* file containing quota information, which is then used to create the quota databases when the project is activated. You will need to download the project's *.mdd* file onto your computer before you run Quota Setup, and then, once you have finished, you will need to upload the newly created *.mqd* file into the project's folder in your Users folder. If the project uses Sample Management quotas, you will also need to upload an additional *.mdd* file that Quota Setup creates to hold Sample Management variables. For more information, see the topic IBM SPSS Data Collection Quota Setup in Chapter 2 on p. 308.
- **Upload participant records.** If the project uses Sample Management, use Participants to load some participant records for your test interviews.
- **Activate the project in Test mode.** Once you have successfully compiled an interviewing program, it is time to activate the project in Test mode. This allows you to test the questionnaire by running interviews. These interviews are flagged as test interviews and can easily be deleted or otherwise omitted from the data used for toplines and final analysis. Use the Launch activity to activate the project.
  Note: Build has built-in options for activating and testing questionnaires, which you can use instead of the corresponding steps listed here.
- **Set up parameters for telephone interviewing.** If the project is to be used for telephone interviewing, run Phone Surveys to assign values to the various telephone interviewing parameters used by the Sample Management script. You can also use this activity to customize the call outcome list for the project, to specify which fields in the participant records can be seen and edited by interviewers, and to specify that the project will use an autodialer to call participants. (For more information about using autodialers, see Dialer Administration.)
- **Edit the Sample Management Script.** If there are errors in the Sample Management script, use Participant Rules to make the corrections.

If testing shows that there are errors in the questionnaire, or you want to make changes for other reasons, return to Build (or the authoring product you are using), make your changes and reactivate the project. You can do this as many times as necessary until the test interviews produce the results you require.

- **Translate the questionnaire.** Once you are satisfied that the test interviews are working correctly, you can translate the questionnaire if the project requires multilingual interviewing. Interviewer Server Administration does not has a translation tool, so you will need to download the *.mdd* file onto your computer so that it can be translated using IBM® SPSS® Translation Utility, and then upload the updated *.mdd* file into Interviewer Server Administration ready for activation. The activity that you use for downloading and uploading files between your computer and Interviewer Server Administration is called Files.
- **Send email invitations to prospective participants.** If the survey allows self-completion interviews, you may want to send email messages to prospective respondents inviting them to participate in the survey and giving instructions on how to start an interview. You can

use Email to set up email jobs that will send messages to all or selected respondents in the Sample file.

- **Activate the project in Active mode.** This makes the project available for live interviewing.
- **Interviews take place.** Respondents connect to your web site to take the survey as a self-completion interview, or interviewers use Phone Participants to make outbound calls to prospective participants. If you have interviewers working remotely using IBM® SPSS® Data Collection Interviewer, you can monitor their activity by running IBM SPSS Data Collection Remote Administration.
- **Review quotas.** Once interviewing is under way, you may want to keep track of interviewing progress with regard to any quotas that have been set by the project. Quotas allows you to check the quotas that have been set for each cell, and to change the targets if necessary.
- **Monitor telephone interviewers.** You can monitor telephone interviews in real-time, so that you can see the question that the interviewer is currently asking and the answer that he or she enters. If the project uses an autodialer to call participants, you can also listen to the interview. For more information, see the topic Interviewer Monitoring on p. 272.
- **Monitor interviewing status.** You can keep track of the number of interviews terminating which each status by running Status. You can also run a number of telephone interviewing reports using the Phone activity.
- **Monitor interviewer session engine activity.** Interviewer session engines run interviews. You can run Interview Activity Report to monitor the activity of each engine to check that it is not becoming overloaded. You can also check the spread of projects across engines. You should run these reports regularly all the time that interviewing is in progress as they can help you anticipate and deal with loading issues before they start to impact productivity.
- **Review interviews.** You might want to review completed interviews to check that telephone interviewers have conducting the survey correctly. If necessary, you can amend the answers that the interviewer entered. For more information, see the topic Review Interviews on p. 203.
- **View topline tables.** Use Survey Results to see at a glance how interviewing is progressing. You can view data for a single question in the questionnaire or produce cross-tabulations of two or more questions. Tables can be filtered based on the responses to questions in the questionnaire, or on interview status (for example, only include completed interviews).
- **Export the data.** Once interviewing has finished and you want to run a full analysis on the data, you use Export Data to export the data in a variety of formats for analysis with an activity of your choice. For more information, see the topic Export Data on p. 261.

Managing Your Work

This topic lists points to bear in mind when creating and working on projects that you are or will be sharing with other users. For further information on these points, refer to *IBM® SPSS® Data Collection Interviewer Server Administration User's Guide*.

- When you create a new project you can use the Permissions tab to specify which roles (user groups) can access the project. If you forget to do this or you need to change your choices, ask your IBM® SPSS® Data Collection Interviewer Server administrator to do it for you.

- Files are created and updated in your user folder. If you want the files to become available to other users you must check them in to the shared folder. There is no need to do this every time you change or create a file so, for example, you can build a questionnaire using Build, test it, refine it and then retest without checking anything in. When you have finished building the questionnaire (or the first version of it) you should check it in then.
- Some activities check in copies of files from your Users folder to the Shared folder. Nevertheless, it is good practise always to check in all files that you want to make public when you have finished with them.
- The first time you work on a project, the project becomes locked by you. This means that although other users may be able to access the project's files for reading, they cannot change them. Typically, all Interviewer Server activities are unavailable to other users of a project if the project is locked by you.
- Projects are not unlocked automatically. You must unlock a project when you have finished working on it, after you have checked in the latest files.
- Do not unlock a project before you have checked in all its files as this may mean that other people who use the project will use old versions of the files which do not have your latest changes in them.
- Do not keep a project locked longer than you need to as this prevents others from editing the files.

Note: Some users may have permission to unlock projects that have been locked by other people. If you have this permission, always be very careful when unlocking other peoples' projects, especially of you are going to run activities that alter the project's files. If you can, it is a good idea to check with the user before unlocking the project, particularly if you suspect that the user may be working on the project and may not have checked in the latest versions of the project files. If you have to unlock a project to work on it, always let the project's owner know what you have done.

Build

Build is an easy-to-use tool for building questionnaires that can be used with IBM® SPSS® Data Collection Interviewer Server for web-based interviewing or with Paper for pen-and-paper-based interviewing. It has been designed for relatively small and simple questionnaires of up to 100 or so questions. If you want to create larger or more complex questionnaires you should use other tools such as IBM® SPSS® Data Collection Base Professional.

Build breaks down the task of defining questions into the following stages: basic, advanced, presentation, and export and analysis. This approach enables you to draft the basic outline of your questionnaire without having to define the detailed structure and content of each question, unless, of course, you wish to do so.

At the basic level, you define the question name (a default is supplied), the question text and, if appropriate, the list of responses from which choices may be made.

The advanced level allows you to complete the definitions by defining, for example, response types for single and multiple choice lists or valid ranges for numeric questions.

The presentation level currently applies only to Interviewer Server questionnaires and defines how the question should appear on the screen.

The export and analysis level lets you define alternative question and response texts for use in tabulations. Typically, you tend to use longer texts in printed or Web questionnaires whereas shorter texts work better in analyses.

Other facilities include:

- **Shared lists**. Shared lists are a quick and easy way of dealing with responses that are common to a number of questions. If you place the responses in a shared list, you can then insert them in any number of questions simply by selecting the name of the list. There is no need to retype the response texts or to copy and paste responses between questions.
- **Bookmarks**. Bookmarks identify particular positions in a questionnaire with unique names and are useful in large questionnaires with complex routing requirements.
- **Exit codes**. You can terminate an interview immediately and for any reason by specifying an exit code of your choice. A typical example is with quota control when you will usually want to terminate the interview if the respondent belongs in a category whose quota has already been filled.
- **Groups**. Questions can be grouped so that they are all displayed on a single page when the questionnaire is used for web-based interviewing with Interviewer Server (this is sometimes referred to as a multiask question).
- **Gotos**. Questions are presented in the order they appear in the questionnaire. You can define simple routing for individual choices within a response list, and more complex routing instructions based on combinations of answers to one or more questions can be specified using If...Goto items. Routing that must be followed by all respondents can be defined using a standard Goto item.
- **Library files**. Questions that are common to a number of questionnaires can be saved in the library and can be imported wherever they are needed.
- **Scripting statements for the Routing section**. Questionnaires have two sections. The Metadata section defines the questions and the Routing section determines how and when the questions will be displayed. Build creates a simple Routing section based on the order you have defined the questions in the questionnaire, but you will usually want to insert other statements in the Routing section as well. Build provides IOM Script and Insert from Script Library items for inserting code in the Routing section of the questionnaire.
- **Print preview**. You can display an image of the printed questionnaire.
- **User and questionnaire options**. You can set defaults for certain Build parameters, both for yourself and for specific questionnaires.

Questionnaires are stored as *.mdd files* and can be translated for multilingual interviewing. You can set a default primary language for all questionnaires or you can define the primary language separately for each questionnaire when you create it. When you create an interviewing questionnaire or print a questionnaire, this is the language that will be used if there are no translations available.

Using Build With and Without IBM SPSS Data Collection Interviewer Server Administration

You can run Build from IBM® SPSS® Data Collection Interviewer Server Administration or as a standalone program outside Interviewer Server Administration. When you run Build from Interviewer Server Administration, it automatically opens the project that is current when you select the Build link, and lets you work only on this project. If you want to work on another

project, you must close Build, return to Interviewer Server Administration to choose the project, and then restart Build. If you are a Scriptwriter, this is the way you will normally use Build.

When you run Build by typing its URL into your browser, Build starts with no project selected so you can either open an existing questionnaire or create a new one. If you are an administrator, this is the way to create library files of general questions that can be loaded into any project. For more information, see the topic Running Build Outside IBM SPSS Data Collection Interviewer Server Administration on p. 73.

This difference in the way Build works means that the options that are available in the File menu will differ according to how you started Build.

Switching between Build and IBM SPSS Data Collection Base Professional

Questionnaires can be created and edited in Base Professional as well as in Build, and you can switch between applications while working on a single questionnaire. For more information, see the topic Switching Between Build and IBM SPSS Data Collection Base Professional on p. 69.

Starting Build

To Start Build from within IBM® SPSS® Data Collection Interviewer Server Administration

- Choose the project you want to create and click Build.

To Start Build outside Interviewer Server Administration

- In your browser, type:

http://server_name/spssmr/InterviewBuilder

The Main Screen

The working area of the main screen is divided into five tabbed sections, each designed to present different aspects of the questionnaire.

Overview tab. Displays the contents of each question in the questionnaire, and provides facilities for inserting, deleting, and moving questions. You can also use this tab to select questions for editing, and to link two or more questions to form a group.

Edit tab. Displays basic details (usually name, text and choices) about a single question. Use this tab to create the basic content of your questionnaire and then insert more detail by working on the Advanced tab.

Advanced tab. Displays full details for a single question, and provides facilities for defining routing, specifying whether a question must be answered, whether it is a standard or dummy question, and the order in which responses are to be displayed during interviews. For grids, you also specify whether the subjects are the rows or columns of the grid. For numerics, you specify the range of valid responses.

Presentation tab. Displays presentation details about a single question. Work on this tab when you want to define how the question should appear on the screen or on the printed page.

Export/Analysis tab. Displays export values for a question, including the label text and category values (response codes). Use this tab when you want to export the questionnaire for analysis purposes but do not want to use the default texts and response codes.

On all tabs, if you hover over a question name in the list of questions on the left of the page, Build displays a pop-up showing the question text.

The menu bar at the top of the screen contains the following options:

File. Create, open or save questionnaires, and preview them before printing.

Tools. Activate a questionnaire, and set Build options.

Getting Started

When you open an empty questionnaire, follow the instructions below to define the content of the questionnaire.

Note: These instructions assume that you will define each question in full before inserting the next question. If you prefer, you can define the basics for every question using just the Edit tab and then fill in the Advanced and Presentation details for each question as a second phase of the questionnaire development.

- Click Click here to insert first item.

  This opens the New Item dialog box.

- Choose the item type for the first question and click OK.

  Build selects the Edit tab and displays a form prompting for basic information about the item. The fields on the form will vary depending on the type of item you are creating, but will always include a item name and, for questions, a question text.

- Complete the fields on the form.

- Click the Advanced tab.

  The item definition form appears in its more detailed format, showing other settings that you may define for the current item. Some item types do not have advanced settings, so in these cases the form that you see will be the same as the one you saw when you created the item. Usually, you will need to set advanced options for single response, multiple response, numeric, and grid questions only.

- On the Presentation tab, specify how the question should be displayed during the interview.

- Return to the Edit tab and click Insert Item when you are ready to start the next question.

  Note: Build saves your changes to the current item when you move to another item, so there is no Save facility. However, if you are making a number of changes to a item you can click Apply to save the changes you have made so far.

Item Names

Build generates a unique name for every item you insert in the questionnaire. If you insert items from a library file, and an item in the library file has the same name as an item that already exists in the questionnaire, Build automatically modifies the name of the incoming item so that it remains unique within the questionnaire as a whole.

You can define your own item names if you wish. Names must be unique and must not match any keyword in the Interview Scripting language or any of the SQL keywords listed below. (The Interview Scripting language is what you use to create questionnaire scripts if you do not use Build. It consists of mrScriptMetaData and mrScriptBasic.)

Add	By	Desc	Into	Select	Value
All	Categorical	Double	Level	Set	Values
Alter	Column	Drop	Long	Stdev	Where
As	Count	Exec	Max	Sum	With
Asc	Create	From	Min	Table	
Avg	Date	Group	Object	Text	
Base	Default	Having	On	Truncate	
Boolean	Delete	Insert	Order	Update	

Setting User and Questionnaire Options

You can set options for all your Build sessions and for all work that you do on the current questionnaire. This allows you to streamline your work by making Build do a lot of the basic work for you.

You can set the following options.

User options

Default presentation style for new questionnaires. The page layout template file to be used for displaying questions during interviews with IBM® SPSS® Data Collection Interviewer Server, when no other templates are defined within the questionnaire.

Default grid style for new questionnaires. The grid layout template file to be used for grid questions during interviews with Interviewer Server, when no other templates are defined within the questionnaire.

Primary language for new questionnaires. The language that will be used as the default primary (base) language for all new questionnaires that you create.

Current questionnaire options

Primary language. The primary (base) language for the current questionnaire. Build displays this at the top of the Edit, Advanced and Presentation tabs.

Default presentation style. The page layout template file to be used as the default for all questions in the current questionnaire. To assign a different template to a particular question, select it using the question's Presentation tab.

Answer prompt. Interviewer Server prompts for numeric and text responses using the word Answer. To use a different prompt for the current questionnaire, select the radio button next to the empty text box and type the prompt in the box.

To Set Options

- Choose:
  Tools > Options

  This opens the Options dialog box.

- Choose or set the options you want to use as defaults.

- Click OK.

Display Options for the Overview Tab

The Overview tab displays a summary listing of the all the questions in the questionnaire and their response lists. Although this a useful things to have, it can become a little unwieldy in questionnaires with many questions, or where questions have long single choice or multiple choice response lists. The Display options box in the top right corner of the tab lets you reduce the amount of detail displayed in order to increase the number of questions visible per page. You have three options: full question, question name and text, or question name. Whichever one you choose becomes the default for future sessions.

The setting you choose for the Overview tab does not affect any other tabs. If the Overview tab displays question names only, you will still see the full question text and response list when you switch to the Edit or Advanced tab. Similarly, it does not affect other actions, such as question grouping, that you perform on the Overview.

To Set Display Options

- In Display Options, choose the setting you want to use and click Apply.

Previewing the Printed Questionnaire

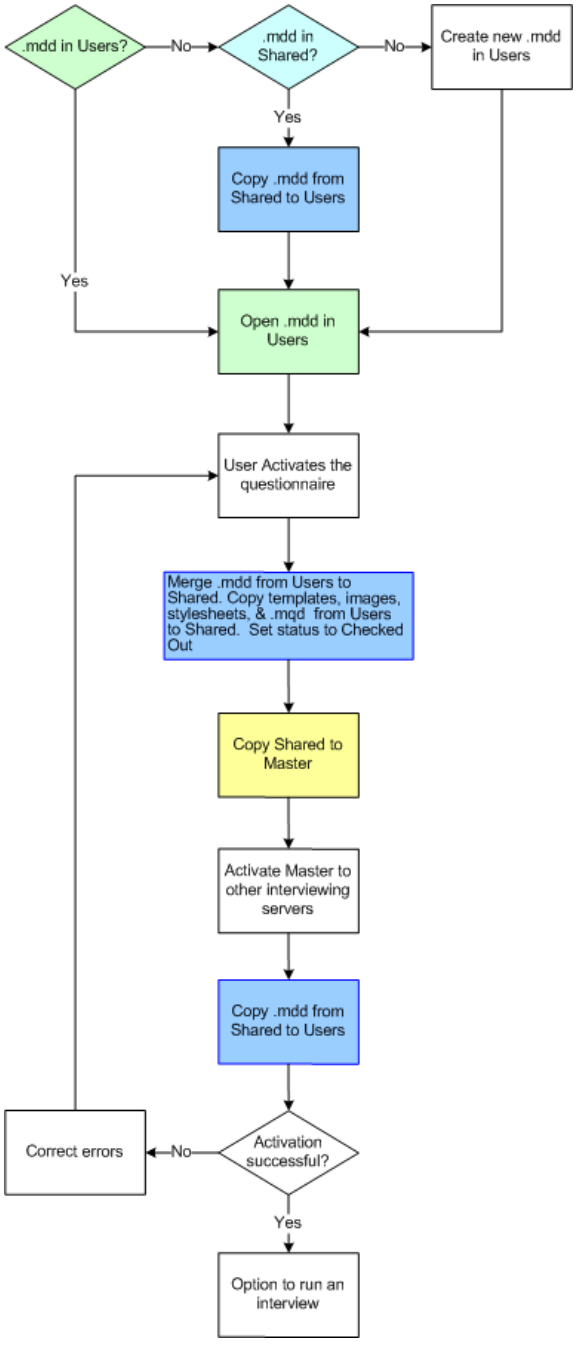
- Choose:
  File > Print Preview

  A new browser window opens using IBM® SPSS® Data Collection Questionnaire Viewer to illustrate how the questionnaire will look when printed. Refer to IBM® SPSS® Data Collection Developer Library for further information about Questionnaire Viewer. This is available as a free download from http://www.spss.com/spssmr/DDL/.

Process Flowchart

This flowchart summarizes the processes that run when you work on a questionnaire using Build and shows file movement between the Users, Shared and Master folders. Further explanation is provided below the flowchart.

Figure 1-2
Build Process flowchart


.mdd in Users?
No
.mdd in Shared?
No
Create new .mdd in Users
Yes
Copy .mdd from Shared to Users
Yes
Open .mdd in Users
User Activates the questionnaire
Merge .mdd from Users to Shared. Copy templates, images, stylesheets, & .mqd from Users to Shared. Set status to Checked Out
Copy Shared to Master
Activate Master to other interviewing servers
Copy .mdd from Shared to Users
Correct errors
No
Activation successful?
Yes
Option to run an interview

Although Build works mainly with files in the project's folder within the Users folder, it will sometimes use the corresponding files from the Shared folder if the files it wants are not available in the Users folder, and will copy files from the Users folder into the Shared folder. In the upper section of the flowchart, only the named files are copied from the Shared folder to the Users folder. Template or image files used by the questionnaire and stored in the Shared folder are

not copied to the Users folder. You can use the Files activity to copy (check out) files from the Shared folder into you Users folder.

During activation, the *.mdd* file is copied from the Users folder into the Shared folder if this is the first activation, otherwise the current version in the Users folder is merged into the existing file in the Shared folder. All other files that are needed for interviewing are copied, overwriting any existing files of the same name.

When files are copied between the Shared and Users folders their status is set to Checked Out. If the project is locked then the files in the Shared folder are not accessible by anyone else. Once you unlock the project, the files in the Shared folder become available to other users and can be checked out by those users, even if the files are still present in your Users folder. The words "Checked Out" simply mean that the files are present in the Shared area and in your Users folder; they do not mean that you have exclusive access to the files in the Shared folder. When you have finished working on a project, you should always check in all the files and then unlock the project.

Leaving Build

▶ Click the Home button.

This closes your session and returns you to IBM® SPSS® Data Collection Interviewer Server Administration. Do not close your browser with Build still running as this leaves the questionnaire definition file open and unavailable to other users until Build times out.

Questions

Build supports the following question types:

- Single and multiple response
- Numeric
- Text
- Single and multiple response grids
- Numeric grids

It also supports Shared Lists as an efficient method of defining responses that are common to a number of questions, and Display Text items for defining instructional and other non-question text that you want to include in the questionnaire.

Build has its own questionnaire library that comes with a number of standard questionnaires that you can use or modify as required. You can also add your own questionnaires to the library. For more information, see the topic Using the Questionnaire Library on p. 47.

Single and Multiple Response Questions

Single and multiple response questions (also known as categorical questions) have a predefined set of answers from which choices can be made. Build provides separate options for creating single response and multiple response questions, and you must choose the one that matches the types of responses you want to allow.

You can filter the response list so that, when interviews take place, only responses that were or were not mentioned at a previous question are displayed. This is particularly useful for spontaneous and prompted awareness questions where you want to prompt only for the responses that were not mentioned spontaneously.

In a multiple response question, you can flag some of the responses as single response — for example, if there is a "None of the above" response.

If the response list contains an 'Other' response, respondents can also give answers that are not in the predefined list.

You can associate pictures with responses. These can be in any of the following formats: gif, jpg, jpeg, png, or bmp.

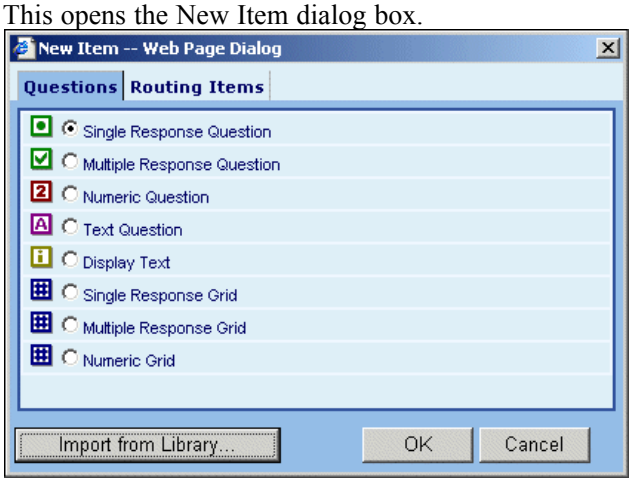
When you export categorical questions, the export process exports the question and response texts exactly as they appear in the questionnaire. Sometimes you'll want to use different texts in your analyses than you used during interviewing. A typical example is question text, where you'll tend to use a more wordy approach in interviewing than in analyses, saying, for example, "What is your overall opinion of the product?" rather than simply "Overall opinion".

Categorical responses are exported as numeric codes, where codes are assigned to responses in the order they appear in the questionnaire. The first response is code 1, the second is code 2, and so on. Numbering is sequential and starts at 1 for each question.

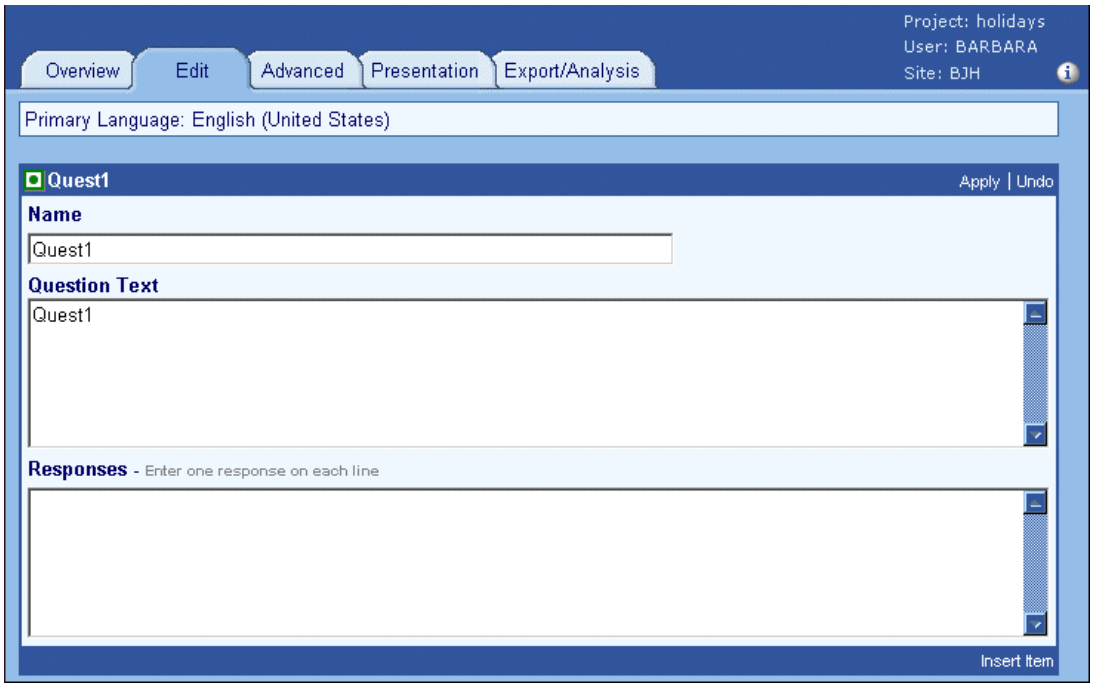
To Create a Single or Multiple Response Question

▶ Click Insert Item.

This opens the New Item dialog box.



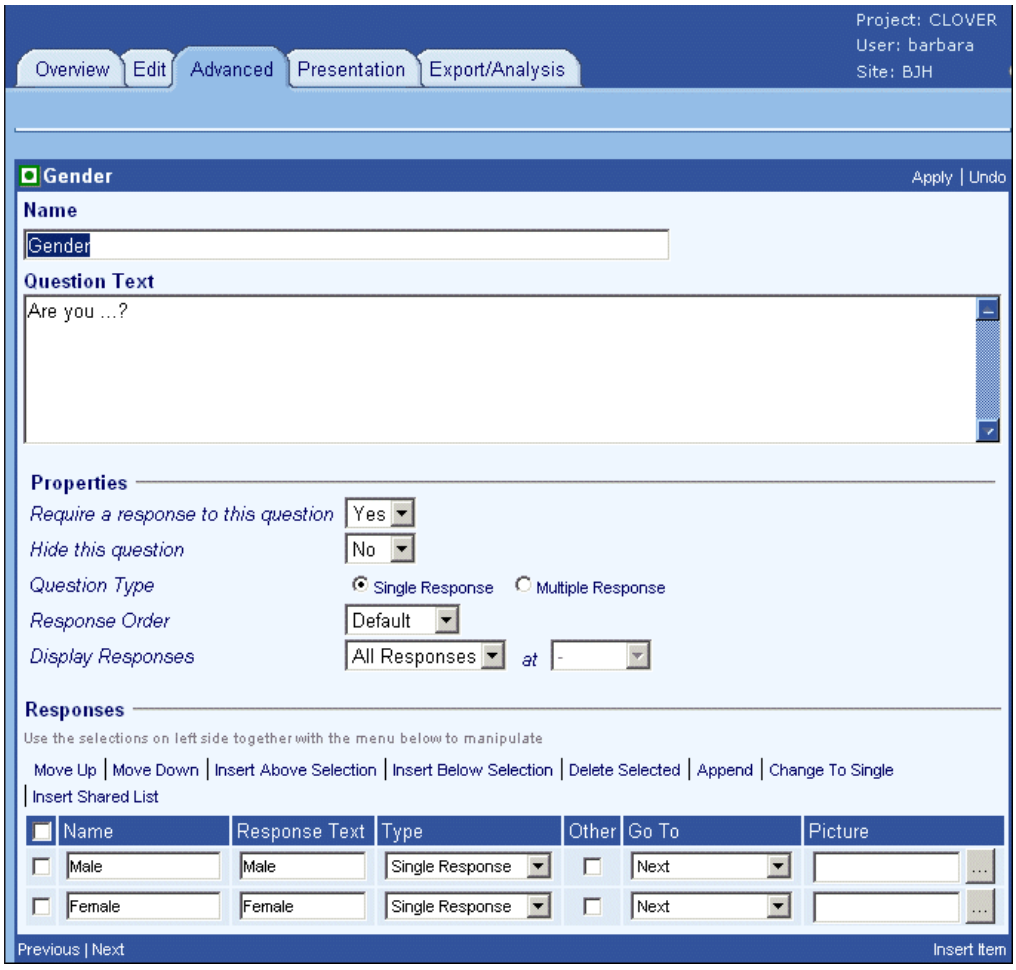
▶ Choose either Single Response Question or Multiple Response Question and click OK.



- In Name, optionally replace the default item name with a name of your choice.
- In Question Text, type the question text.
- In Responses, type the response texts one per line. See Question Limits for information about the maximum number of responses you can place in a list.

To Set Advanced Options

- Select the Advanced tab.



- In Require a response to this question, choose whether or not this question must be answered.

  Note: If a question may be left unanswered, and you do not insert a No Answer response in the category list, Build inserts one automatically. This is because the interview script that is generated from the Build questionnaire requires this in order for respondents to be able to click Next without having to select an answer. (You will not see the No Answer category until your screen is refreshed, for example, when you change tabs. At this point, Build also displays a message telling you that it has added No Answer.)

  If you set this option to Yes and then edit the question later on and change this option to No, Build does not automatically remove No Answer. If you want to disallow No Answer response, you must delete it yourself.

- In Hide this question, choose No if the question should be displayed to the respondent. If this is a dummy question that is to exist in the questionnaire but not be displayed to respondents, choose Yes. (Typically, the responses to hidden questions are set by statements defined in IOM Script items. They provide an efficient method of merging the responses to a number of related questions

into a single variable for use elsewhere in the questionnaire. For this reason, the response list for the hidden question often consists of all the responses to the questions that are to be merged.)

Note: Because they are not displayed, hidden questions are not valid in question groups.

- In Question Type, choose whether this is a single or multiple response question. By default, the setting for this property matches the data type of the item you selected to create this question—that is, if you chose Single Response then Single Response will be selected automatically for this property. You should only need to change this setting if you want to change the question type after the question has been defined. Changing the question type here changes the overall question type in the questionnaire and also changes all the individual response types in the response list.

- In Response Order, choose the order in which responses should be presented. Choose Default to present responses in the order they appear in the response list, Random to present responses in a random order, Rotated to present responses in rotation so that each response takes a turn at being first in the list, or Reversed to present responses in reverse order so that the last response in the list appears first.

- Use the Display Responses boxes if you want to filter the response list based on the respondent's answers to previous related questions.
  - In the first box, choose one of All Responses, Chosen, or Not Chosen.
  - In the second box, choose the question whose answer controls the responses to be displayed for the current question.
  - When prompted, confirm that the responses defined for the chosen question (the parent question) may overwrite the response list for the current question.

  Note: This facility requires that the response list to the current question remains identical to the response list for the chosen question. To achieve this, Build makes the response list for the current question read-only (greyed out) and prevents you changing it. Any changes that you make to the response list in the parent question automatically appear in the response list to the current question.

- In the Responses section, in the Type column, choose one of Single Response, Multiple Response, Don't Know, No Answer, or Refuse to Answer for each response.

- If a response is to be treated as a Specified Other response, click its Other check box. During interviews, respondents can select this response to give an answer that does not appear in the category list.

- To define routing for a response, select the routing destination from the GoTo dropdown list for that response. (If you want to skip forwards in the questionnaire, you must define the question you want to route to before you can select it from the dropdown list.)

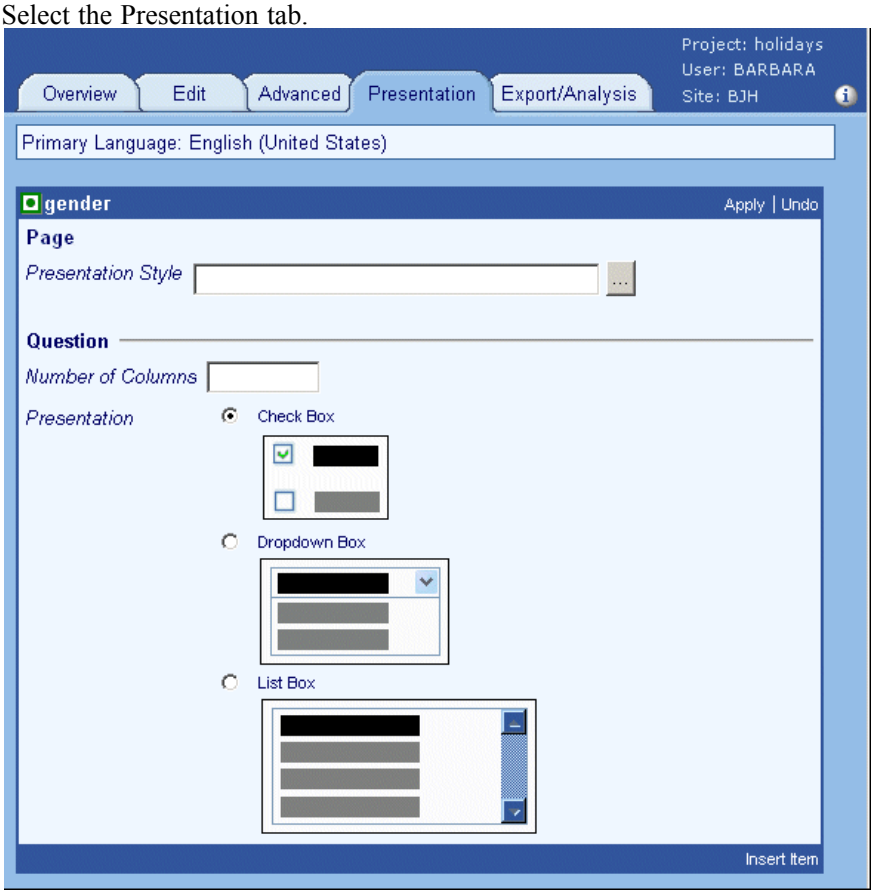
- To associate a picture with a response, do the following:
  - Click the button to the right of the Picture box for that response.
  - On the Select page, locate the image file and then click Select. For more information, see the topic Copying Pictures and Presentation Templates on p. 50.

  The name of the image file is displayed in the Picture box.

- You can add new responses to the list, delete responses, or alter the order of responses in the list using the options above the response list. For more information, see the topic Editing Response and Subject Lists on p. 65.

To Set Presentation Options

- Select the Presentation tab.



- In Presentation Style, select a layout template:
  - Click the button next to the empty box.
  - On the Select page, locate the template file and click Select. For more information, see the topic Copying Pictures and Presentation Templates on p. 50.

  The filename appears in the Presentation Style box.

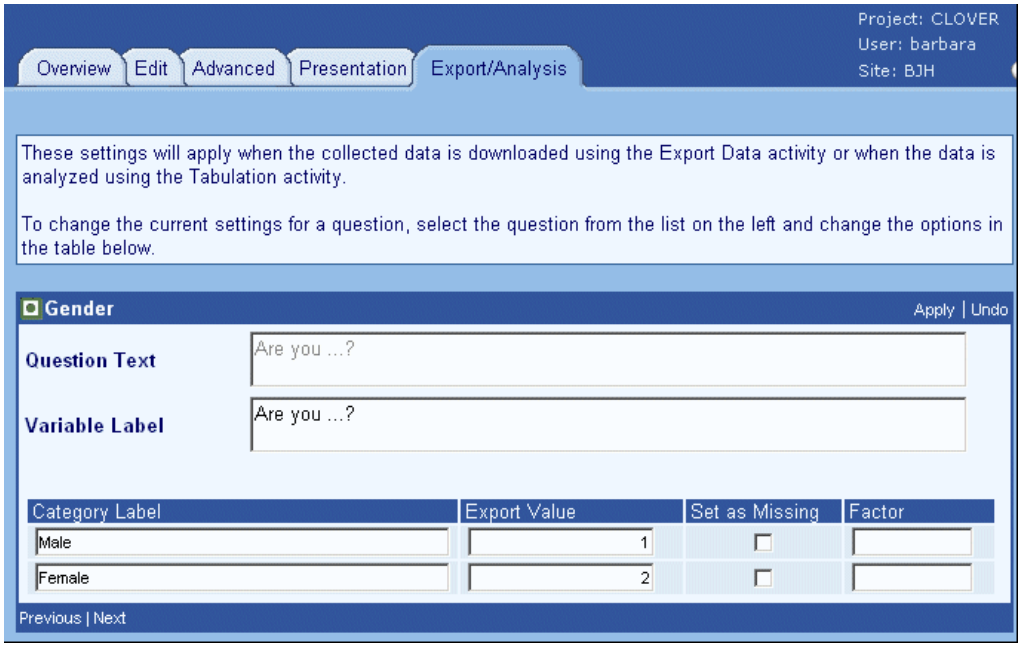
- In Number of Columns, type the number of columns in which to display responses during the interview.

- In Presentation, choose one of Check Box or List Box. If you are creating a single-response question the selection list also includes Dropdown Box.

To Set Export and Analysis Options

- Select the Export/Analysis tab.

Figure 1-3
Export/Analysis tab



- In Variable Label, type the text you want to use as the variable label in place of the question text.
- In Category Label, make any changes you want to the response texts.
- In Export Value, enter the code you want to use to represent each response.
- Select the Set as Missing checkbox for every response you want to treat as missing data.
- To define factors for use when the questionnaire data is tabulated, type a number in the Factor box for each response. Factors may be positive or negative real or integer values.

Numeric Questions

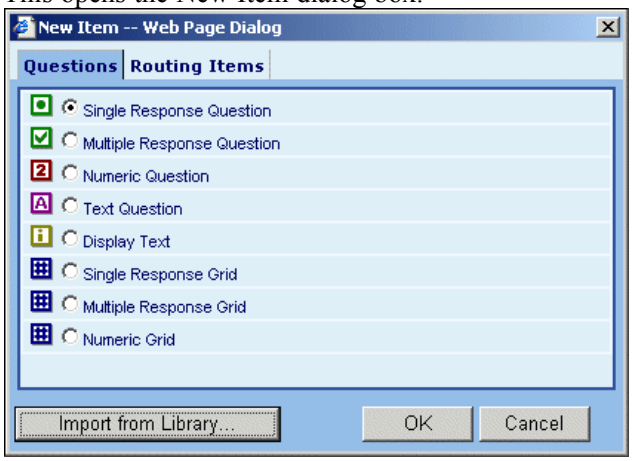
Numeric questions require answers that are integer or real numbers, optionally within a specified range.

When you export numeric questions, the export process exports the question texts exactly as they appear in the questionnaire. Sometimes, you'll want to use different texts in your analyses than you used during interviewing. For example, in an interview you'll ask "How old are you?" but in tabulations you may prefer the text "Age" or "Age of respondent".

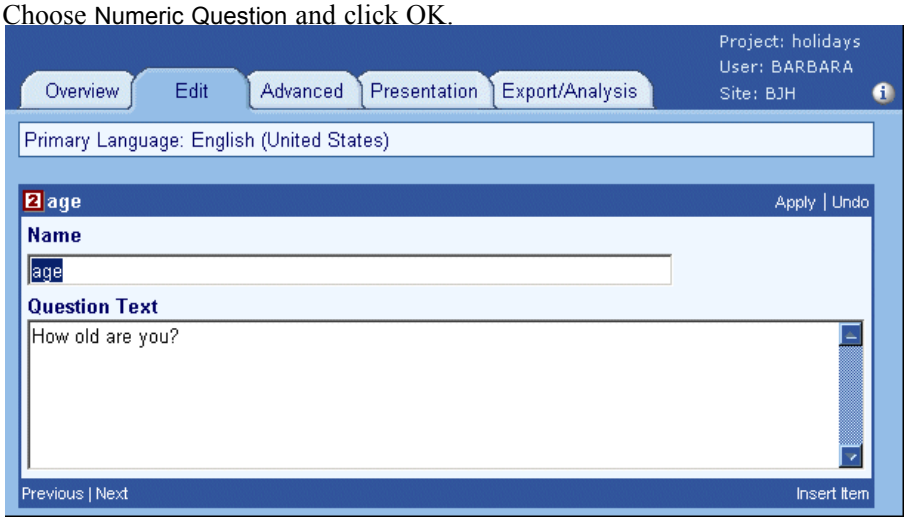
To Create a Numeric Question

▶ Click Insert Item.

This opens the New Item dialog box.



▶ Choose Numeric Question and click OK.

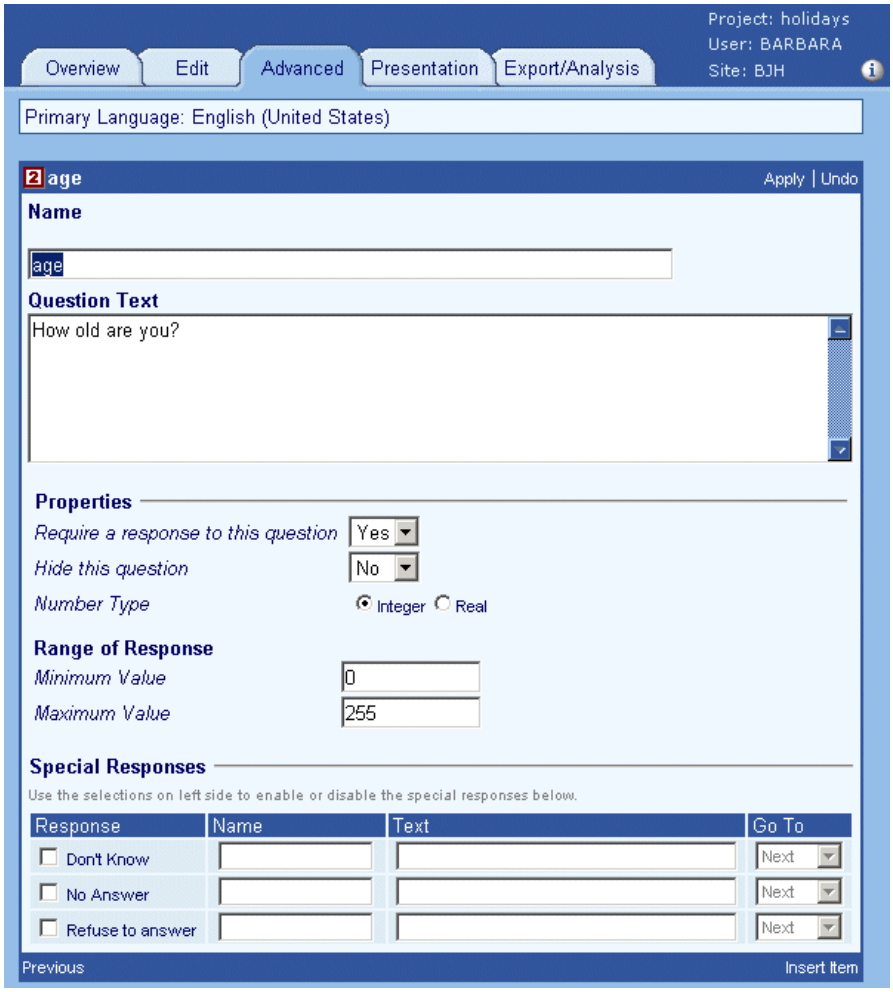


▶ In Name, optionally replace the default item name with a name of your choice.

▶ In Question Text, type the question text.

To Set Advanced Options

▶ Select the Advanced tab.



- In Require a response to this question, choose whether or not this question must be answered.

  Note: If a question may be left unanswered, and you do not insert a No Answer response in the category list, Build inserts one automatically. This is because the interview script that is generated from the Build questionnaire requires this in order for respondents to be able to click Next without having to select an answer. (You will not see the No Answer category until your screen is refreshed, for example, when you change tabs. At this point, Build also displays a message telling you that it has added No Answer.)

  If you set this option to Yes and then edit the question later on and change this option to No, Build does not automatically remove No Answer. If you want to disallow No Answer response, you must delete it yourself.

- In Hide this question, choose No if the question should be displayed to the respondent. If this is a dummy question that is to exist in the questionnaire but not be displayed to respondents, choose Yes. (Typically, the responses to hidden questions are set by statements defined in IOM Script items. They provide an efficient method of merging the responses to a number of related questions

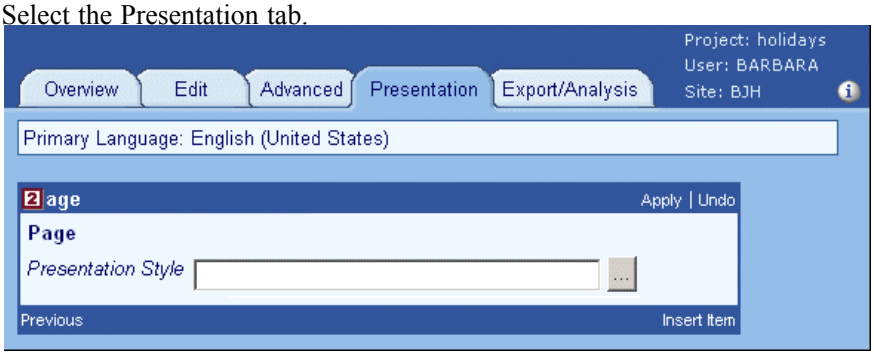
into a single variable for use elsewhere in the questionnaire. For this reason, the response list for the hidden question often consists of all the responses to the questions that are to be merged.)

Note: Because they are not displayed, hidden questions are not valid in question groups.

- In Number Type, choose either Integer or Real depending on the type of numeric answer you want to accept.
- In the Minimum Value and Maximum Value boxes, type the range of values to accept as valid responses. See Question Limits for information about the range of values you can use for numeric responses.
- If you want to allow "No Answer", "Don't Know", or "Refuse to Answer" as special responses to this question, do the following:
  - In Special Responses, select the responses you want to allow.
  - If you want a response to be displayed with a text other than the one shown on this tab, type the text in the Text box.
  - To define routing for a special response, select the routing destination from the GoTo dropdown list for that response. (If you want to skip forwards in the questionnaire, you must define the question you want to route to before you can select it from the dropdown list.)

To Set Presentation Options

- Select the Presentation tab.



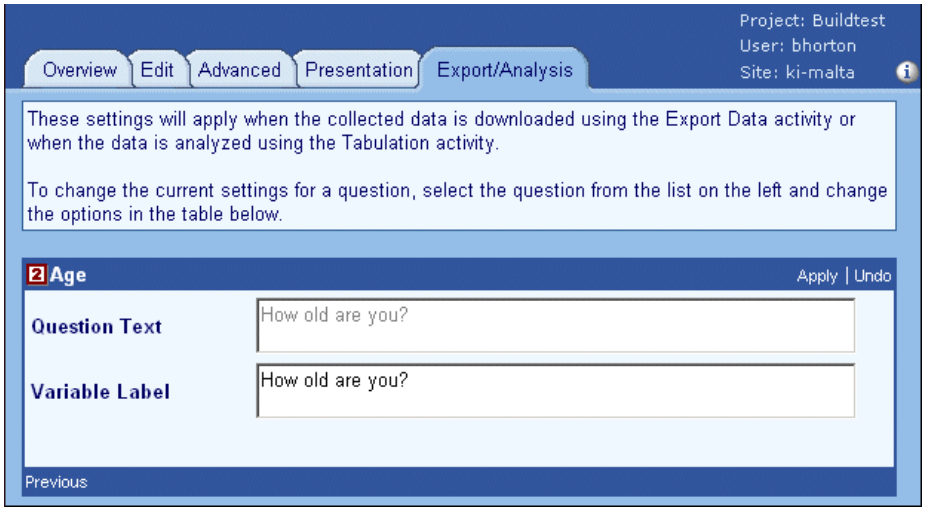
- In Presentation Style, select a layout template:
  - Click the button next to the empty box.
  - On the Select page, locate the template file and click Select. For more information, see the topic Copying Pictures and Presentation Templates on p. 50.

The filename appears in the Presentation Style box.

To Set Export and Analysis Options

- Select the Export/Analysis tab.

Figure 1-4
Export/Analysis tab


Project: Buildtest
User: bhorton
Site: ki-malta
Overview
Edit
Advanced
Presentation
Export/Analysis
These settings will apply when the collected data is downloaded using the Export Data activity or when the data is analyzed using the Tabulation activity.
To change the current settings for a question, select the question from the list on the left and change the options in the table below.
Age
Apply | Undo
Question Text
How old are you?
Variable Label
How old are you?
Previous

▶ In Variable Label, type the text you want to use as the variable label in place of the question text.

Text Questions

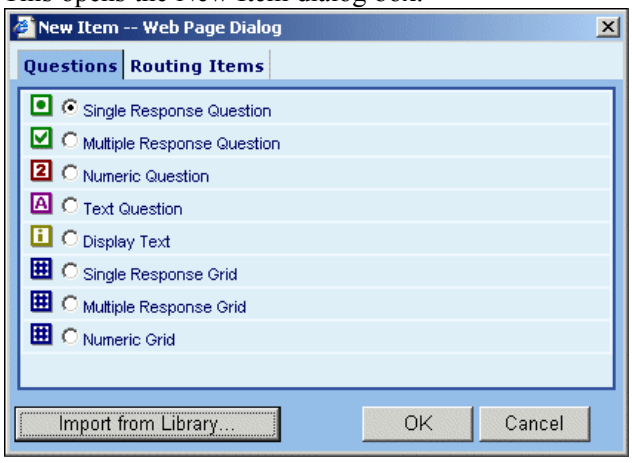
Text questions accept any answer.

When you export text questions, the export process exports the question texts exactly as they appear in the questionnaire. Sometimes, you'll want to use different texts in your analyses than you used during interviewing. For example, in an interview you'll ask "What is your name?" but in tabulations you may prefer the text "Name" or "Name of respondent".

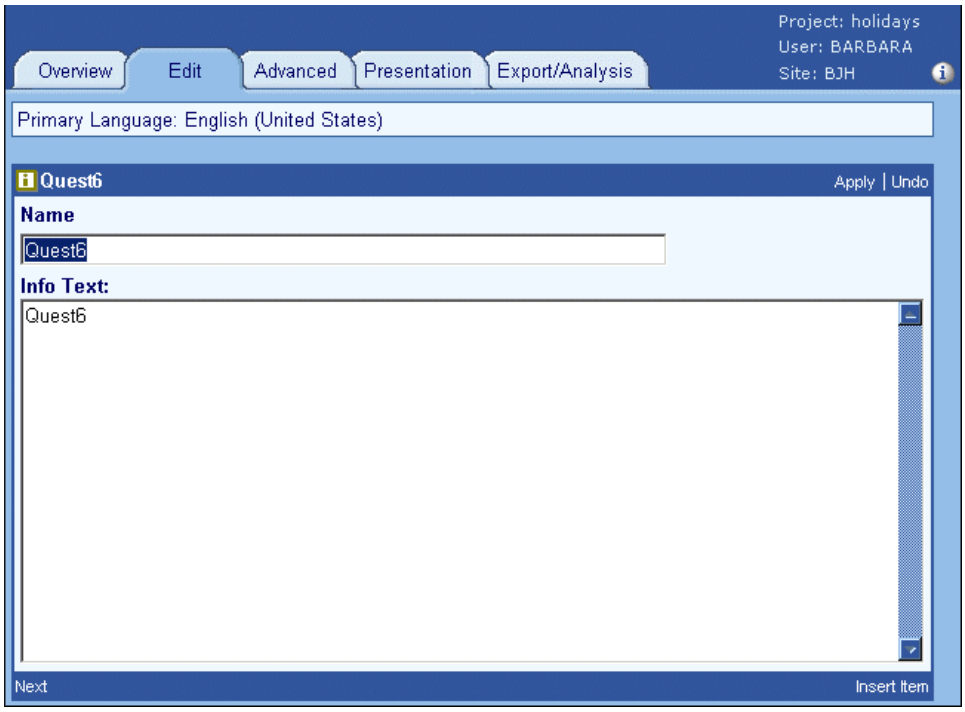
To Create a Text Question

▶ Click Insert Item.

This opens the New Item dialog box.



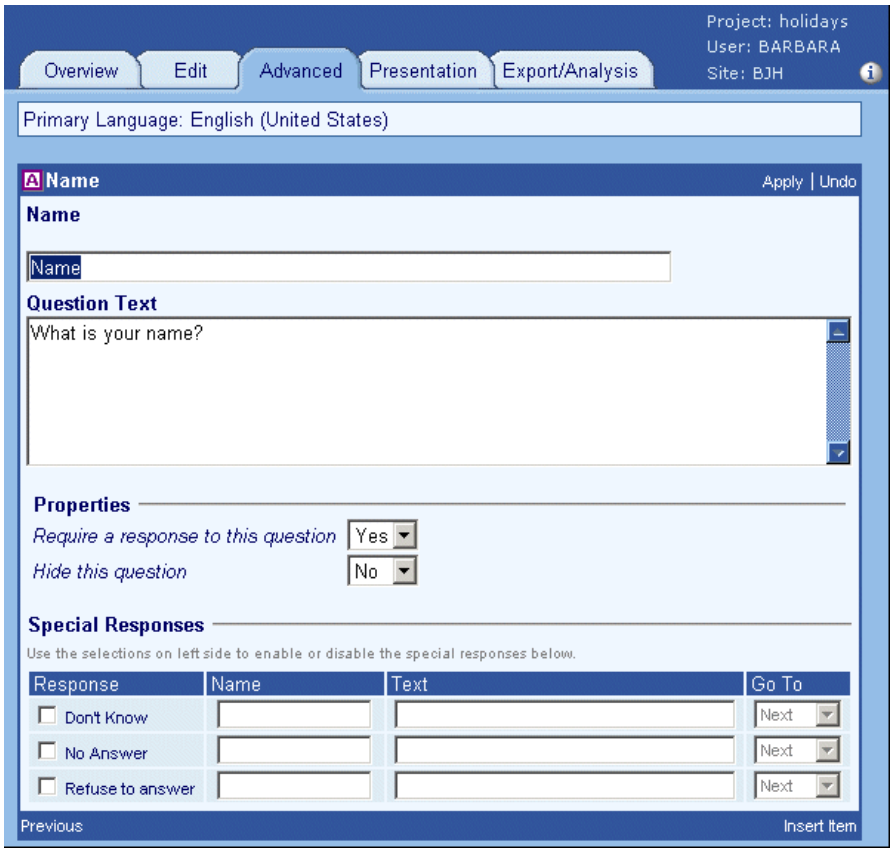
▶ Choose Text and click OK.



- In Name, optionally replace the default item name with a name of your choice.
- In Question Text, type the text of the question.

To Set Advanced Options

- Select the Advanced tab.



- In Require a response to this question, choose whether or not this question must be answered.

  Note: If a question may be left unanswered, and you do not insert a No Answer response in the category list, Build inserts one automatically. This is because the interview script that is generated from the Build questionnaire requires this in order for respondents to be able to click Next without having to select an answer. (You will not see the No Answer category until your screen is refreshed, for example, when you change tabs. At this point, Build also displays a message telling you that it has added No Answer.)

  If you set this option to Yes and then edit the question later on and change this option to No, Build does not automatically remove No Answer. If you want to disallow No Answer response, you must delete it yourself.

- In Hide this question, choose No if the question should be displayed to the respondent. If this is a dummy question that is to exist in the questionnaire but not be displayed to respondents, choose Yes. (Typically, the responses to hidden questions are set by statements defined in IOM Script items. They provide an efficient method of merging the responses to a number of related questions

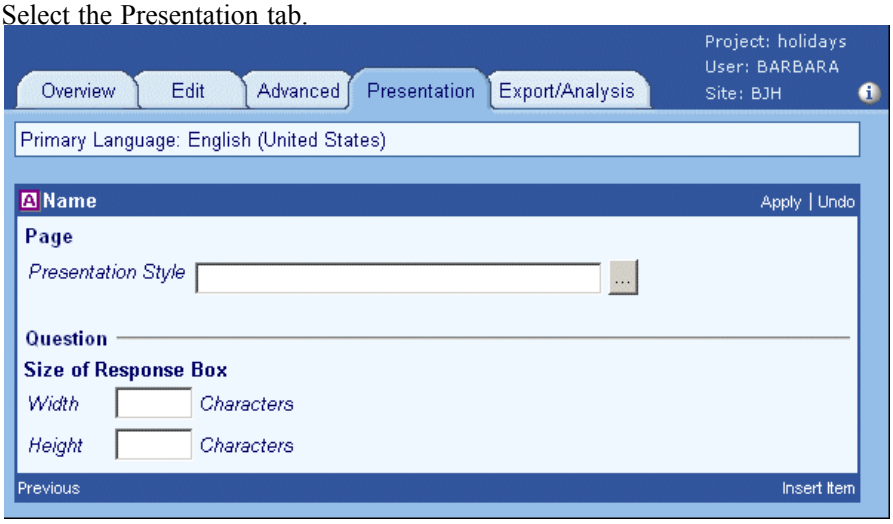
into a single variable for use elsewhere in the questionnaire. For this reason, the response list for the hidden question often consists of all the responses to the questions that are to be merged.)

Note: Because they are not displayed, hidden questions are not valid in question groups.

- If you want to allow "No Answer", "Don't Know", or "Refuse to Answer" as special responses to this question, do the following:
  - In Special Responses, select the responses you want to allow.
  - If you want a response to be displayed with a text other than the one shown on this tab, type the text in the Text box.
  - To define routing for a special response, select the routing destination from the GoTo dropdown list for that response. (If you want to skip forwards in the questionnaire, you must define the question you want to route to before you can select it from the dropdown list.)

To Set Presentation Options

- Select the Presentation tab.



- In Presentation Style, select a layout template:
  - Click the button next to the empty box.
  - On the Select page, locate the template file and click Select. For more information, see the topic Copying Pictures and Presentation Templates on p. 50.

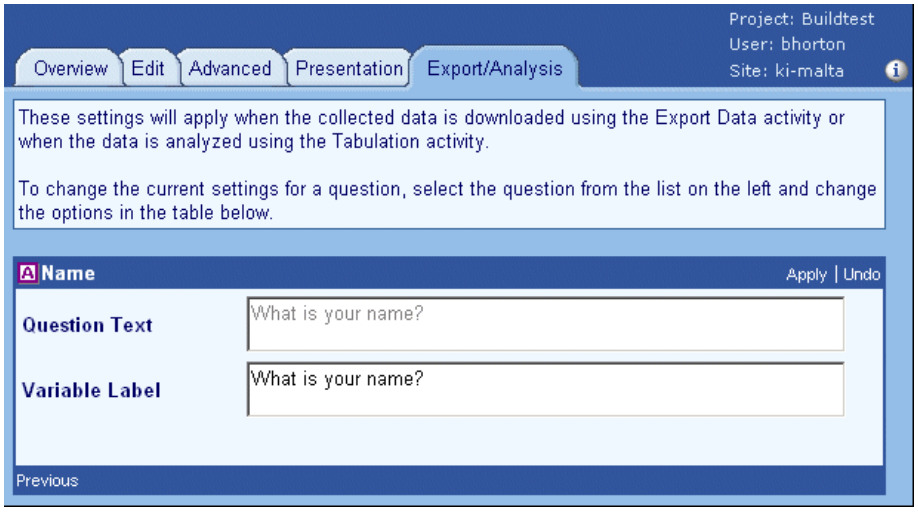
  The filename appears in the Presentation Style box.

- In Width and Height, enter the dimensions of the response box in characters.

To Set Export and Analysis Options

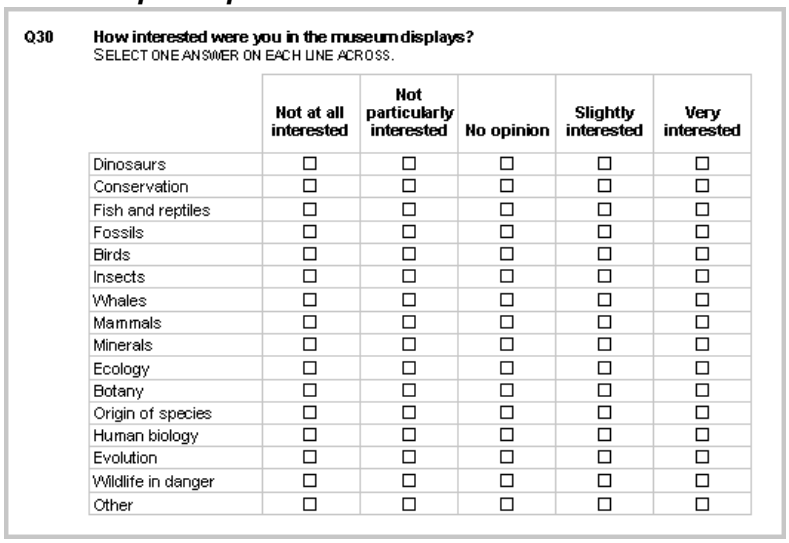
- Select the Export/Analysis tab.

Figure 1-5
Export/Analysis tab


Project: Buildtest
User: bhorton
Site: ki-malta
Overview
Edit
Advanced
Presentation
Export/Analysis
These settings will apply when the collected data is downloaded using the Export Data activity or when the data is analyzed using the Tabulation activity.
To change the current settings for a question, select the question from the list on the left and change the options in the table below.
Name
Apply | Undo
Question Text
What is your name?
Variable Label
What is your name?
Previous

- In Variable Label, type the text you want to use as the variable label in place of the question text.

Single and Multiple Response Grid Questions



Q30 **How interested were you in the museum displays?**
SELECT ONE ANSWER ON EACH LINE ACROSS.

	Not at all interested	Not particularly interested	No opinion	Slightly interested	Very interested
Dinosaurs	☐	☐	☐	☐	☐
Conservation	☐	☐	☐	☐	☐
Fish and reptiles	☐	☐	☐	☐	☐
Fossils	☐	☐	☐	☐	☐
Birds	☐	☐	☐	☐	☐
Insects	☐	☐	☐	☐	☐
Whales	☐	☐	☐	☐	☐
Mammals	☐	☐	☐	☐	☐
Minerals	☐	☐	☐	☐	☐
Ecology	☐	☐	☐	☐	☐
Botany	☐	☐	☐	☐	☐
Origin of species	☐	☐	☐	☐	☐
Human biology	☐	☐	☐	☐	☐
Evolution	☐	☐	☐	☐	☐
Wildlife in danger	☐	☐	☐	☐	☐
Other	☐	☐	☐	☐	☐

Grid questions are an efficient way of asking the same question about a number of related topics. The question is displayed in a tabular or grid form, with the subquestions (*subjects*) forming one dimension of the grid and the responses forming the other. A typical example of a single/multiple response grid is a question that asks respondents to rate a number of products on a scale of Excellent to Very Poor.

Build provides separate options for creating single response and multiple response grids, but you can still change the response type of individual responses within a grid if you wish.

You can filter the response list so that, when interviews take place, only responses that were or were not mentioned at a previous question are displayed. This is particularly useful for spontaneous and prompted awareness questions where you want to prompt only for the responses that were not mentioned spontaneously.

In a multiple response grid, you can flag some of the categories as single response—for example, if there is a "None of the above" category.

You can associate pictures with responses. These can be in any of the following formats: gif, jpg, jpeg, png, or bmp.

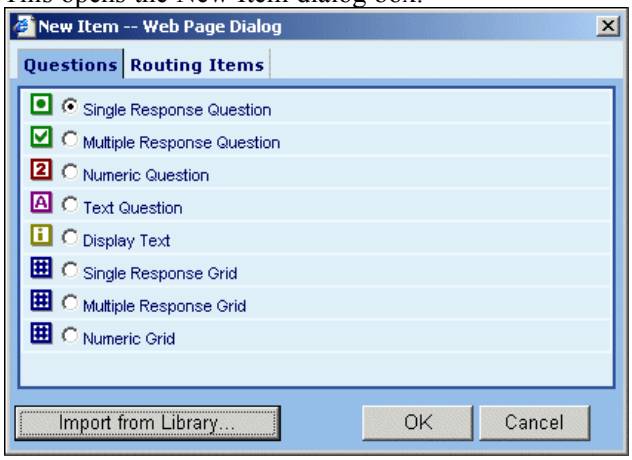
When you export grid questions, the export process exports the question and response texts exactly as they appear in the questionnaire. Sometimes, you'll want to use different texts in your analyses than you used during interviewing. A typical example is question text, where you'll tend to use a more wordy approach in interviewing than in analyses, saying, for example, "What is your overall opinion of the products?" rather than simply "Overall opinion".

The variable labels for the grid subjects consist of the subject text followed by a colon and then the main question text. For instance, if the main question text is "What is your overall opinion of the products?" and the products are different brands of washing powder, the variable labels for each product would default to, say, "Washo:What is your overall opinion of the products?", "Suds:What is your overall opinion of the products?", and so on. These texts are unlikely to be what you want to see in your tables.

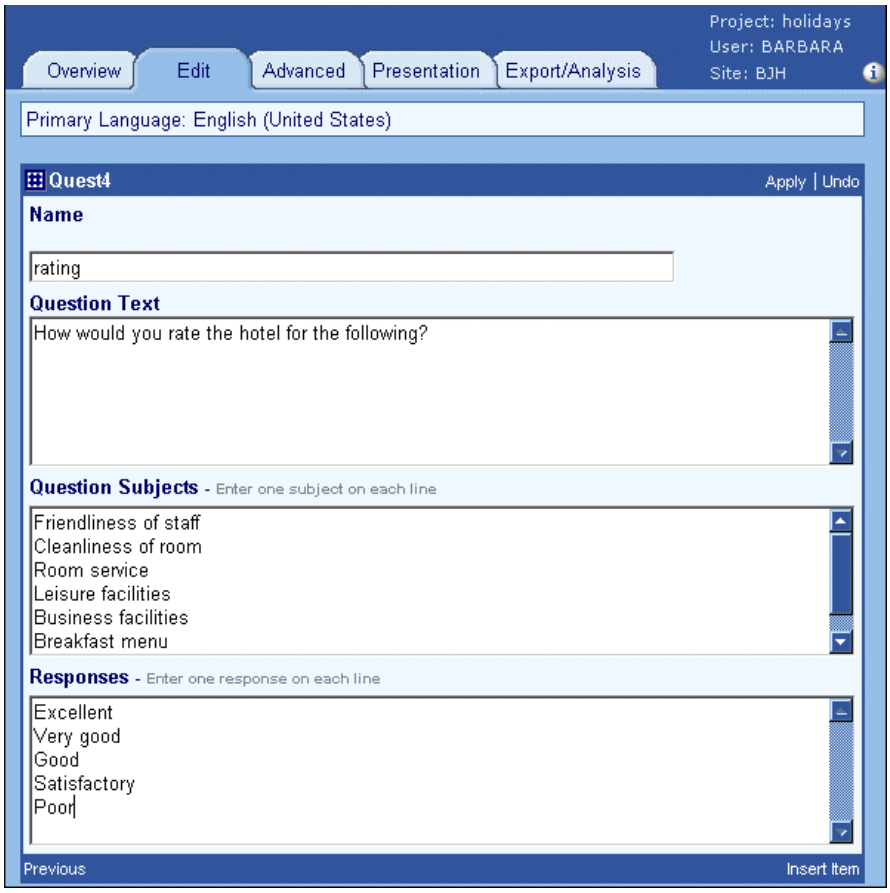
To Create a Single/Multiple Response Grid Question

▶ Click Insert Item.

This opens the New Item dialog box.



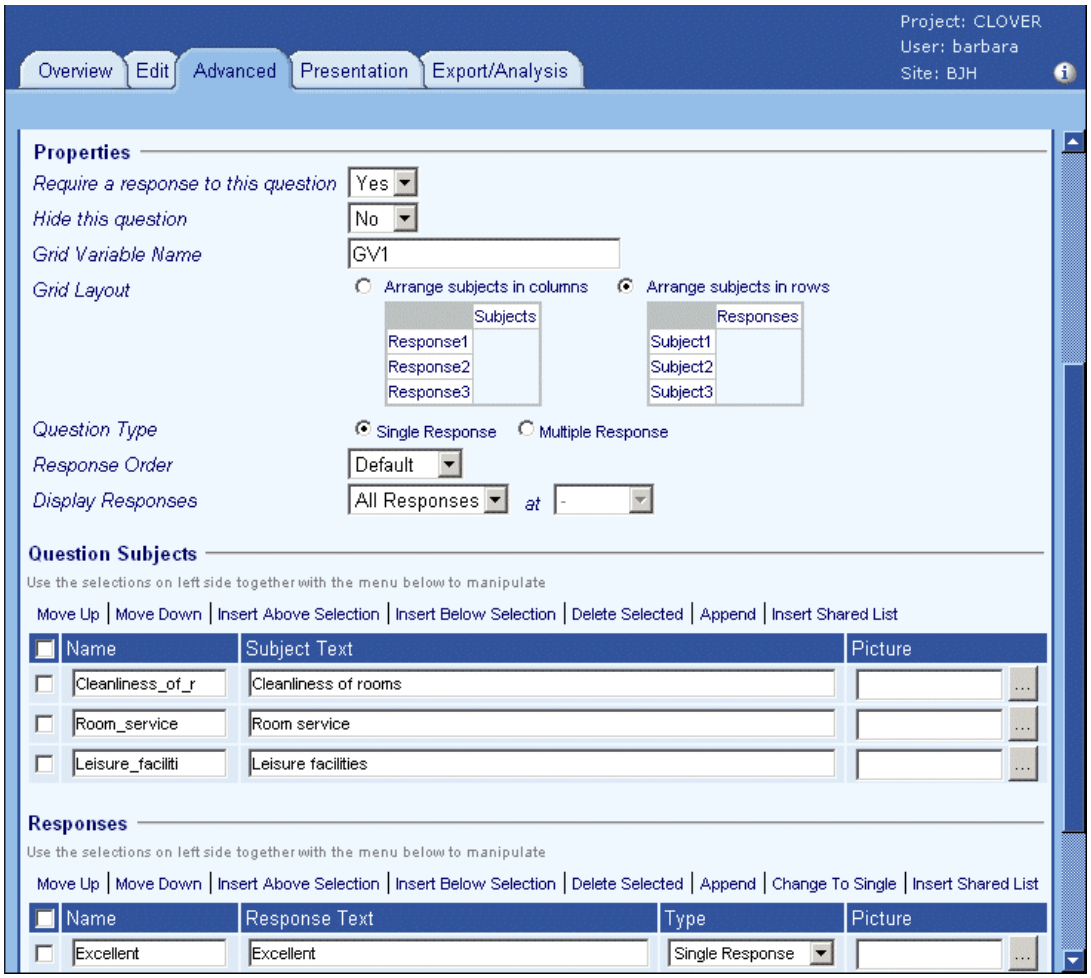
▶ Choose Single Response Grid or Multiple Response Grid and click OK.



- In Name, optionally replace the default item name with a name of your choice.
- In Question Subjects, type the subjects that you want to ask about.
- In Responses, type the answer texts one per line. See Question Limits for information about the maximum number of responses you can place in a list.

To Set Advanced Options

- Select the Advanced tab.



- In Require a response to this question, choose whether or not this question must be answered.

  Note: If a question may be left unanswered, and you do not insert a No Answer response in the category list, Build inserts one automatically. This is because the interview script that is generated from the Build questionnaire requires this in order for respondents to be able to click Next without having to select an answer. (You will not see the No Answer category until your screen is refreshed, for example, when you change tabs. At this point, Build also displays a message telling you that it has added No Answer.)

  If you set this option to Yes and then edit the question later on and change this option to No, Build does not automatically remove No Answer. If you want to disallow No Answer response, you must delete it yourself.

- In Hide this question, choose No if the question should be displayed to the respondent. If this is a dummy question that is to exist in the questionnaire but not be displayed to respondents, choose Yes. (Typically, the responses to hidden questions are set by statements defined in IOM Script items. They provide an efficient method of merging the responses to a number of related questions

into a single variable for use elsewhere in the questionnaire. For this reason, the response list for the hidden question often consists of all the responses to the questions that are to be merged.)

Note: Because they are not displayed, hidden questions are not valid in question groups.

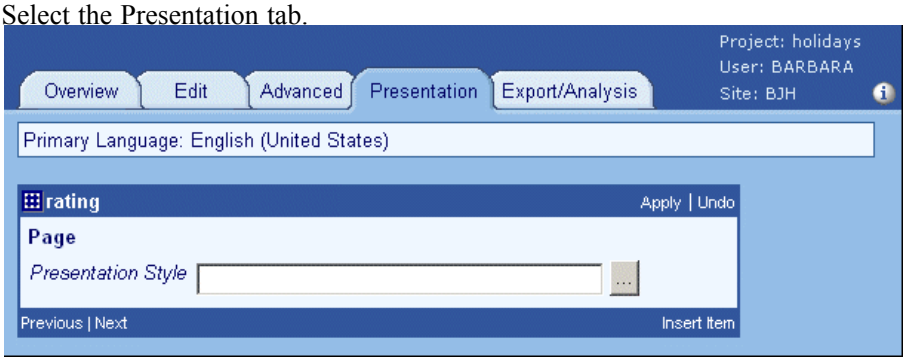
- In Grid Variable Name, enter a name for this question within the grid item as a whole. The default is GV*number*, so if the item name is Q5, the first line of code generated for this item will be labelled Q5, whereas the question itself will be labelled GV*number*.
- In Grid Layout, choose how the grid will be structured. Choose Arrange subjects in columns to have the subjects as the columns and the responses as the rows. Choose Arrange subjects in rows to have the subjects as the rows of the grid and the responses as the columns. This is the default.
- In Question Type, choose whether this is a single or multiple response question. By default, the setting for this property matches the data type of the item you selected to create this question—that is, if you chose Single Response then Single Response will be selected automatically for this property. You should only need to change this setting if you want to change the question type after the question has been defined. Changing the question type here changes the overall question type in the questionnaire and also changes all the individual response types in the response list.
- In Response Order, choose the order in which responses should be presented. Choose Default to present responses in the order they appear in the response list, Random to present responses in a random order, Rotated to present responses in rotation so that each response takes a turn at being first in the list, or Reversed to present responses in reverse order so that the last response in the list appears first.
- Use the Display Responses boxes if you want to filter the response list based on the respondent's answers to previous related questions.
  - In the first box, choose one of All Responses, Chosen, or Not Chosen.
  - In the second box, choose the question whose answer controls the responses to be displayed for the current question.
  - When prompted, confirm that the responses defined for the chosen question (the parent question) may overwrite the response list for the current question.

  Note: This facility requires that the response list to the current question remains identical to the response list for the chosen question. To achieve this, Build makes the response list for the current question read-only (greyed out) and prevents you changing it. Any changes that you make to the response list in the parent question automatically appear in the response list to the current question.
- In the Responses section, in the Type column, choose one of Single Response, Multiple Response, Don't Know, No Answer, or Refuse to Answer for each response.
- To associate a picture with a response, do the following:
  - Click the button to the right of the Picture box for that response.
  - On the Select page, locate the image file and then click Select. For more information, see the topic Copying Pictures and Presentation Templates on p. 50.

  The name of the image file is displayed in the Picture box.

To Set Presentation Options

- Select the Presentation tab.



- Click the image next to the empty Presentation Style box.
- On the Select page, locate the *.htm* file and click Select.

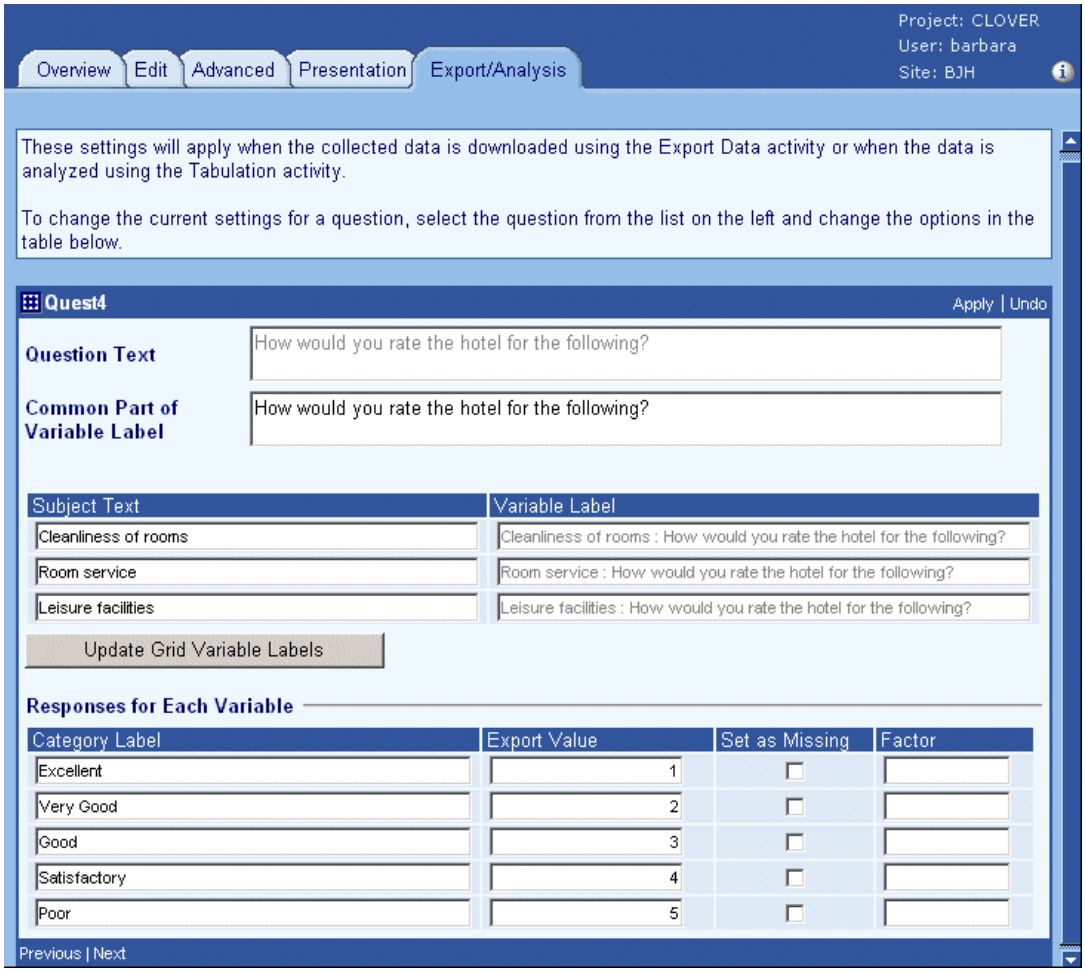
  Build copies the file to the My Presentation Styles folder and displays a message to this effect.
- Click OK to close the message box.

  The name of the presentation template file is displayed in the Presentation Style box.
- Click Apply.

To Set Export and Analysis Options

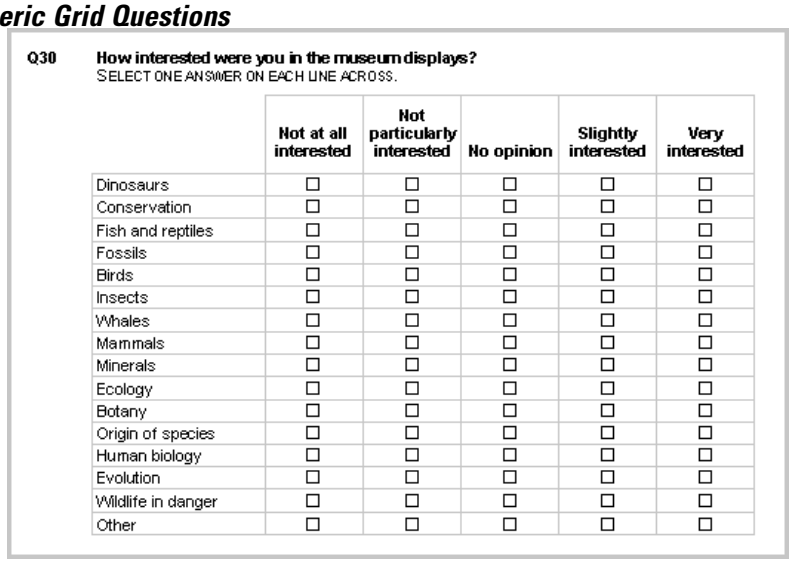
- Select the Export/Analysis tab.

Figure 1-6
Export/Analysis tab


Project: CLOVER
User: barbara
Site: BJH
Overview
Edit
Advanced
Presentation
Export/Analysis
These settings will apply when the collected data is downloaded using the Export Data activity or when the data is analyzed using the Tabulation activity.
To change the current settings for a question, select the question from the list on the left and change the options in the table below.
Quest4
Apply | Undo
Question Text
How would you rate the hotel for the following?
Common Part of Variable Label
How would you rate the hotel for the following?
Subject Text
Variable Label
Cleanliness of rooms
Cleanliness of rooms : How would you rate the hotel for the following?
Room service
Room service : How would you rate the hotel for the following?
Leisure facilities
Leisure facilities : How would you rate the hotel for the following?
Update Grid Variable Labels
Responses for Each Variable
Category Label
Export Value
Set as Missing
Factor
Excellent
1
Very Good
2
Good
3
Satisfactory
4
Poor
5
Previous | Next

- In Variable Label, type the text you want to use as the variable label in place of the question text.
- In Subject Text, amend the subject texts as necessary.
- If you changed the common label text or a subject text and you want the changes to be saved in the *.mdd* file, click Update Grid Variable Values.
- In Category Label, make any changes you want to the response texts.
- In Export Values, enter the codes you want to use to represent each response.
- Select the Set as Missing checkbox for every response you want to treat as missing data.
- To define factors for use when the questionnaire data is tabulated, type a number in the Factor box for each response. Factors may be positive or negative real or integer values.

Numeric Grid Questions



Q30 **How interested were you in the museum displays?**
SELECT ONE ANSWER ON EACH LINE ACROSS.

	Not at all interested	Not particularly interested	No opinion	Slightly interested	Very interested
Dinosaurs	☐	☐	☐	☐	☐
Conservation	☐	☐	☐	☐	☐
Fish and reptiles	☐	☐	☐	☐	☐
Fossils	☐	☐	☐	☐	☐
Birds	☐	☐	☐	☐	☐
Insects	☐	☐	☐	☐	☐
Whales	☐	☐	☐	☐	☐
Mammals	☐	☐	☐	☐	☐
Minerals	☐	☐	☐	☐	☐
Ecology	☐	☐	☐	☐	☐
Botany	☐	☐	☐	☐	☐
Origin of species	☐	☐	☐	☐	☐
Human biology	☐	☐	☐	☐	☐
Evolution	☐	☐	☐	☐	☐
Wildlife in danger	☐	☐	☐	☐	☐
Other	☐	☐	☐	☐	☐

Grid questions are an efficient way of asking the same question about a number of related topics. The question is displayed in a tabular or grid form, with the subquestions (*subjects*) forming one dimension of the grid and the responses forming the other. A typical example of a numeric grid is a question that asks respondents how many times they consumed various types of soft drinks on different days of the week.

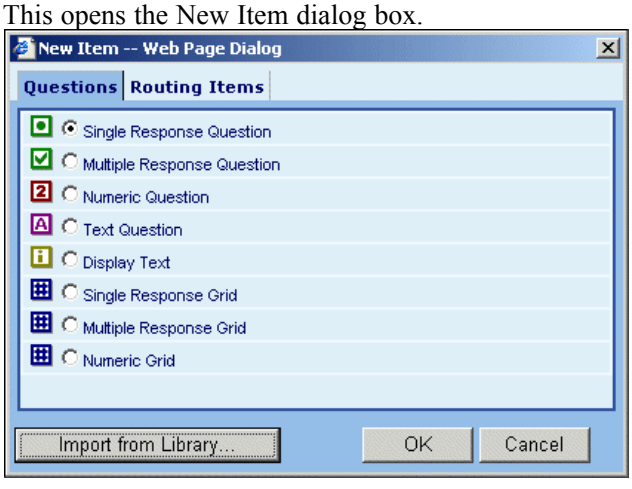
You can associate pictures with responses. These can be in any of the following formats: gif, jpg, jpeg, png, or bmp.

When you export numeric grid questions, the export process exports the subject and response texts exactly as they appear in the questionnaire. You can specify different texts for analyses if you wish.

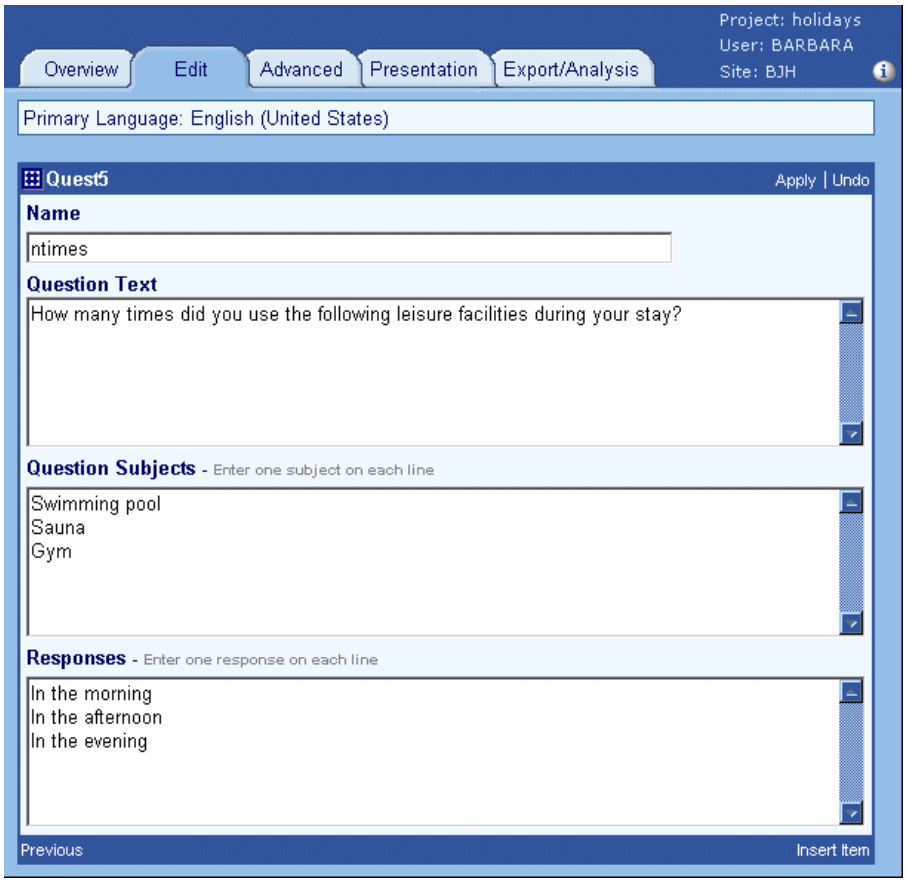
To Create a Numeric Grid Question

▶ Click Insert Item.

This opens the New Item dialog box.



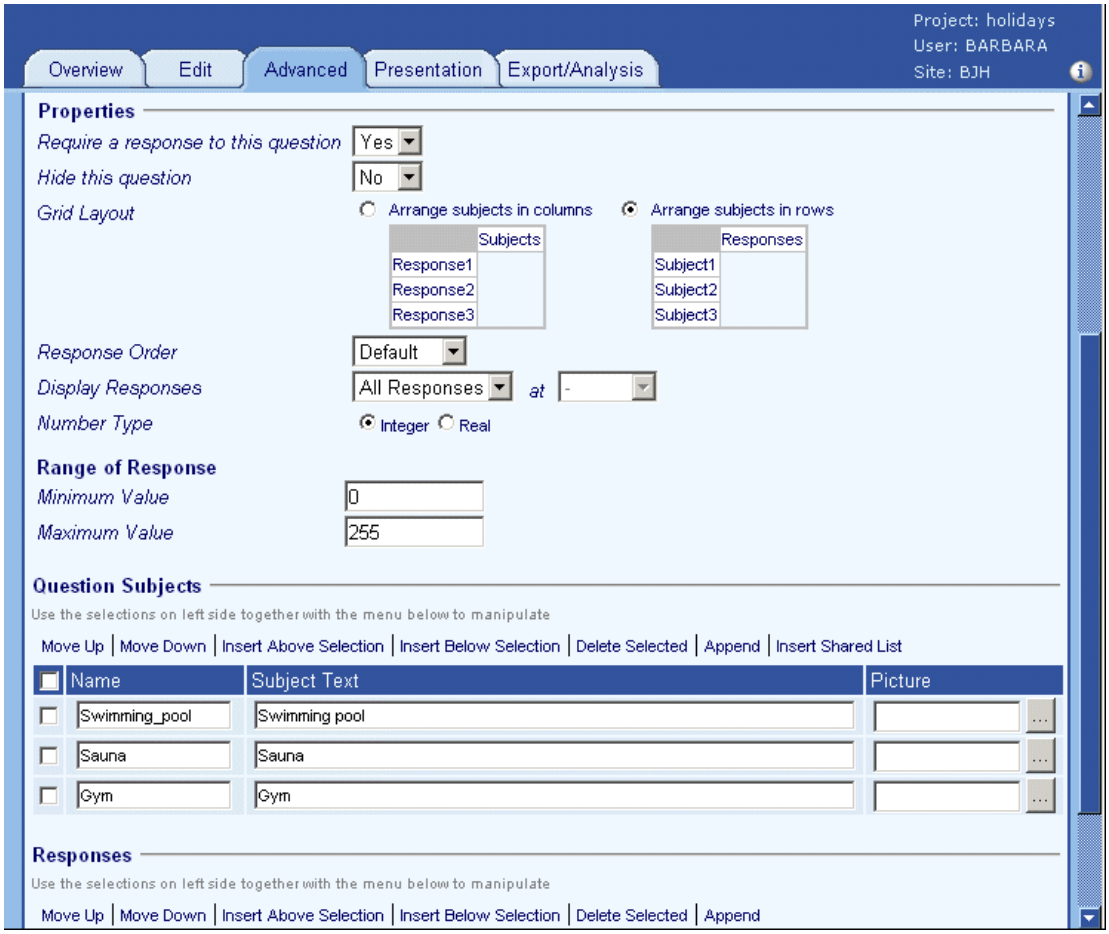
▶ Choose Numeric Grid and click OK.



- In Name, optionally replace the default item name with a name of your choice.
- In Question Subjects, type the subjects that you want to ask about.
- In Responses, type the answer texts one per line. See Question Limits for information about the maximum number of responses you can place in a list.

To Set Advanced Options

- Select the Advanced tab.



- In Require a response to this question, choose whether or not this question must be answered.

  Note: If a question may be left unanswered, and you do not insert a No Answer response in the category list, Build inserts one automatically. This is because the interview script that is generated from the Build questionnaire requires this in order for respondents to be able to click Next without having to select an answer. (You will not see the No Answer category until your screen is refreshed, for example, when you change tabs. At this point, Build also displays a message telling you that it has added No Answer.)

  If you set this option to Yes and then edit the question later on and change this option to No, Build does not automatically remove No Answer. If you want to disallow No Answer response, you must delete it yourself.

- In Hide this question, choose No if the question should be displayed to the respondent. If this is a dummy question that is to exist in the questionnaire but not be displayed to respondents, choose Yes. (Typically, the responses to hidden questions are set by statements defined in IOM Script items. They provide an efficient method of merging the responses to a number of related questions

into a single variable for use elsewhere in the questionnaire. For this reason, the response list for the hidden question often consists of all the responses to the questions that are to be merged.)

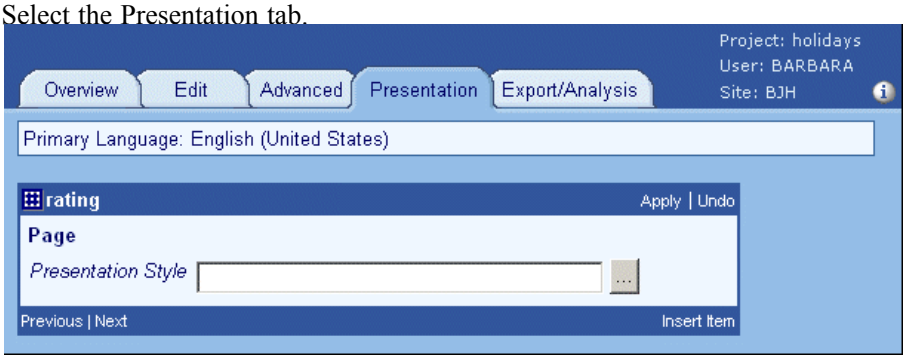
Note: Because they are not displayed, hidden questions are not valid in question groups.

- In Grid Layout, choose how the grid will be structured. Choose Arrange subjects in columns to have the subjects as the columns and the responses as the rows. Choose Arrange subjects in rows to have the subjects as the rows of the grid and the responses as the columns. This is the default.
- In Response Order, choose the order in which responses should be presented. Choose Default to present responses in the order they appear in the response list, Random to present responses in a random order, Rotated to present responses in rotation so that each response takes a turn at being first in the list, or Reversed to present responses in reverse order so that the last response in the list appears first.
- In Number Type, choose either Integer or Real depending on the type of numeric answer you want to accept.
- In the Minimum Value and Maximum Value boxes, type the range of values to accept as valid responses. See Question Limits for information about the range of values you can use for numeric responses.
- To associate a picture with a response, do the following:
  - Click the button to the right of the Picture box for that response.
  - On the Select page, locate the image file and then click Select. For more information, see the topic Copying Pictures and Presentation Templates on p. 50.

  The name of the image file is displayed in the Picture box.

To Set Presentation Options

- Select the Presentation tab.



- Click the image next to the empty Presentation Style box.

- On the Select page, locate the *.htm* file and click Select.

  Build copies the file to the My Presentation Styles folder and displays a message to this effect.

- Click OK to close the message box.

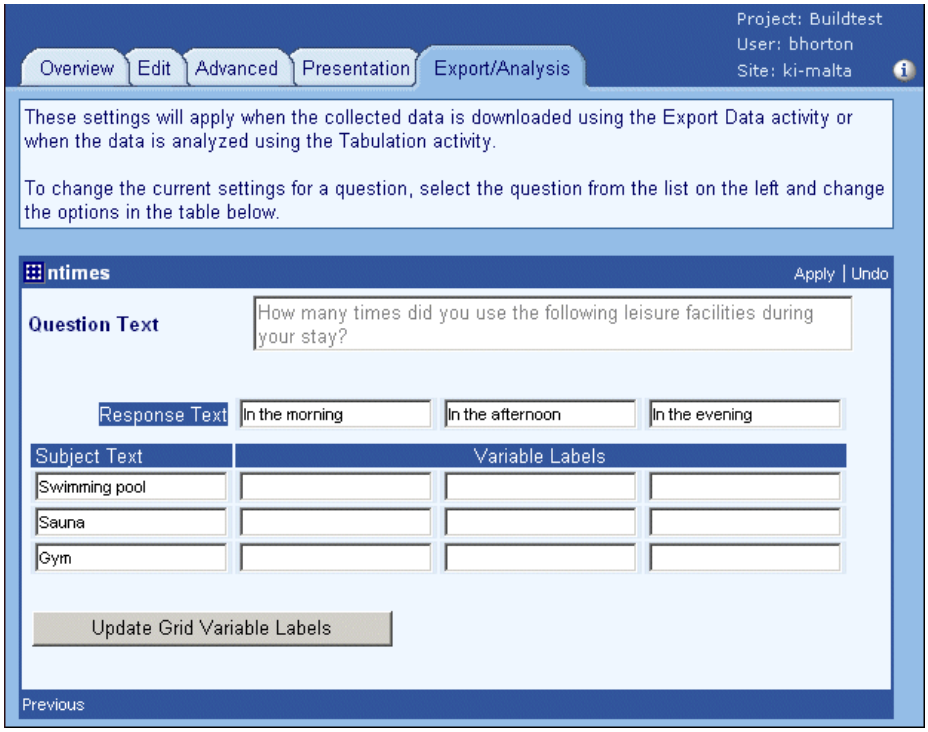
  The name of the presentation template file is displayed in the Presentation Style box.

- Click Apply.

To Set Export and Analysis Options

- Select the Export/Analysis tab.

Figure 1-7
Export/Analysis tab


Project: Buildtest
User: bhorton
Site: ki-malta
Overview
Edit
Advanced
Presentation
Export/Analysis
These settings will apply when the collected data is downloaded using the Export Data activity or when the data is analyzed using the Tabulation activity.
To change the current settings for a question, select the question from the list on the left and change the options in the table below.
ntimes
Apply | Undo
Question Text
How many times did you use the following leisure facilities during your stay?
Response Text
In the morning
In the afternoon
In the evening
Subject Text
Variable Labels
Swimming pool
Sauna
Gym
Update Grid Variable Labels
Previous

- In Response Text, type the texts you want to use as the response texts for the grid.
- In Subject Text, amend the subject texts as necessary.
- If you want the changes to be saved in the *.mdd* file, click Update Grid Variable Values.

Question Limits

The following table describes the limits that apply when defining or responding to a question.

Question Type	Limits
Long (also known as Integer)	The minimum value is -2,147,483,648 and the maximum value is 2,147,483,647.

Question Type	Limits
Double (also known as Decimal or Real)	The minimum value is -1.79769313486232E308 and the maximum value is 1.79769313486232E308. The smallest negative value is -4.94065645841247E-324 and the smallest positive value is 4.94065645841247E-324.
Text	Can in theory be up to 2 billion characters in length. In reality, the length is limited by the database being used to store the response. In a IBM® SPSS® Data Collection relational MR database, the maximum length is 4,000 characters.
Date (also known as Date/Time)	The earliest value is 1 January 100 and the latest value is 31 December 9999.
Categorical (also known as Single Response or Multiple Response)	Can in theory contain up to 2 billion categories. In reality, the number depends on the available memory and the Data Source Component (DSC) being used. A category name must contain between 1 and 128 characters.
All	A question name must contain between 1 and 128 characters.

Shared Lists

Shared lists are a quick and efficient way of dealing with single and multiple choice responses that are common to a number of questions. A typical example might be a five-point rating scale that you want to use for rating various aspects of product. Rather than retyping the five responses for each question, or copying and pasting them from one question to another, you can set them up as a shared list with a unique name and then insert them as a block wherever they are needed.

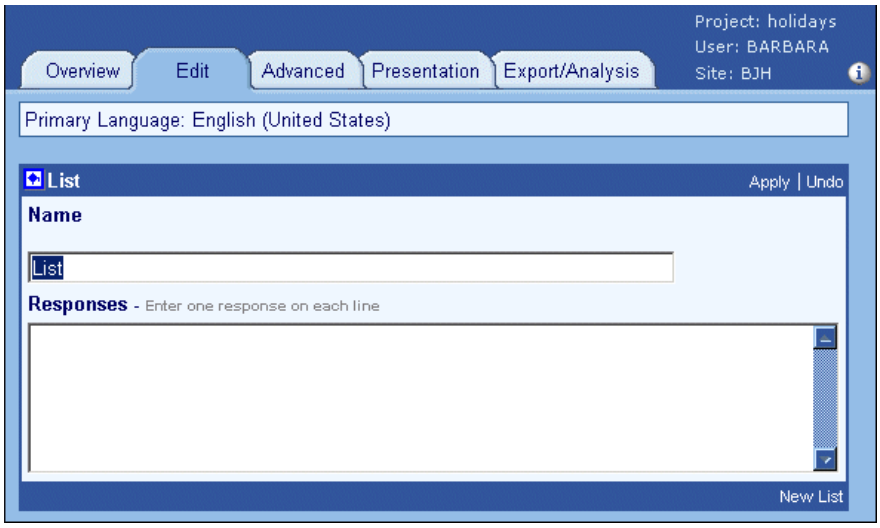
Shared lists are shown at the end of the Overview tab under the heading Shared Lists.

Creating Shared Lists

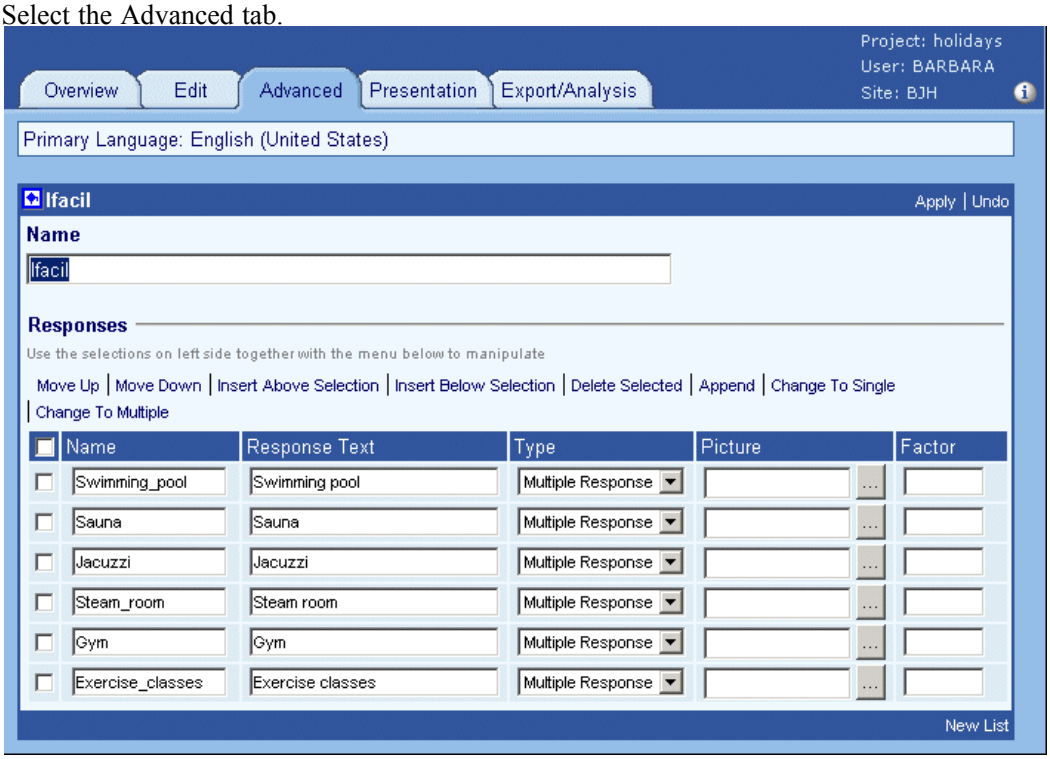
Setting up shared lists is like creating a single or multiple response question. You give the list a name and enter the responses it will contain. Shared lists may contain single choice, multiple choice, no answer, don't know, and refused to answer responses.

To Create a Shared List

▶ Click New List.



- In Name, optionally replace the default item name with a name of your choice.
- In Responses, type the response texts one per line. See Question Limits for information about the maximum number of responses you can place in a list.
- Select the Advanced tab.



- In Type, choose one of Single Response, Multiple Response, Don't Know, No Answer, or Refuse to Answer for each response.

- To associate a picture with a response, do the following:
  - Click the button to the right of the Picture box for that response.
  - On the Select page, locate the image file and then click Select. For more information, see the topic Copying Pictures and Presentation Templates on p. 50.
    The name of the image file is displayed in the Picture box.
- To define factors for use when the questionnaire data is tabulated, type a number in the Factor box for each response. Factors may be positive or negative real or integer values.
- You can add new responses to the list, delete responses, or alter the order of responses in the list using the options above the response list. For more information, see the topic Editing Response and Subject Lists on p. 65.

Using Shared Lists in Questions

When you insert a shared response list in a question, bear in mind the following:

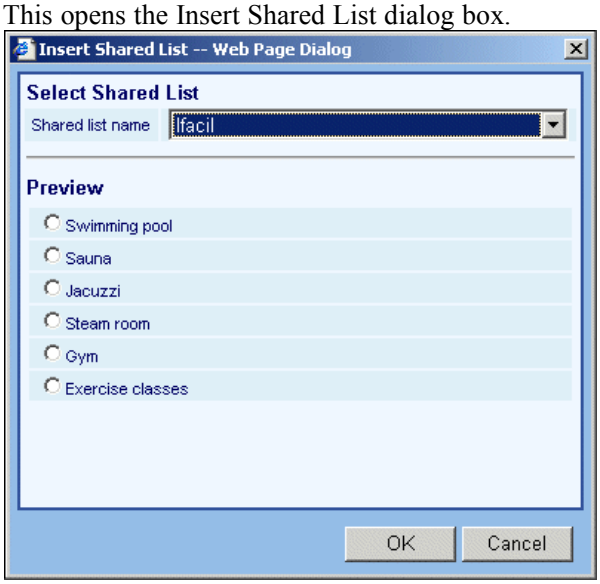
- The responses are inserted as a single entity and cannot be edited individually. The response lines are greyed out and a single entry containing the list name appears above the list so that you can move or delete the list as a whole. If you want to change a response text you must make the change in the shared list item, but bear in mind that this change will also affect any other questions that use the shared list.
- The only changes you can make to individual responses once they have been inserted in a question is to assign pictures and factors. These changes apply to the current question only; they do not affect any other questions in which the shared list is used.
- If you insert a multiple choice shared list into a single response question, the responses in the list are changed to single response types for that question only. If you subsequently change the overall response type for the question, any responses that are defined as multiple choice in the shared list will revert to being multiple choice in the question. Shared responses that are defined as single choice never change their response type.
- Do not insert more than one shared list into a question as this may result in responses that have duplicate names. If you try to do this, Build issues an error message to this effect. If you need to use more than one shared list for a question, create a new shared list containing all the responses in the two existing lists and use that instead.
- Do not insert a shared list into a question that already contains ordinary responses, unless those responses are flagged as the special No Answer, Don’t Know, or Refused responses, as this could result in responses with duplicate names.

To Insert a Shared List in a Question

- Select the question’s Advanced tab.

- In the Responses section, click Append Shared List.

  This opens the Insert Shared List dialog box.



- In Shared list name, select the name of the list you want to insert.

  The responses in the list are displayed in the lower part of the dialog box.

- Click OK to insert the responses in the question's Responses section.

- If necessary, assign pictures or factors to the responses you have just inserted.

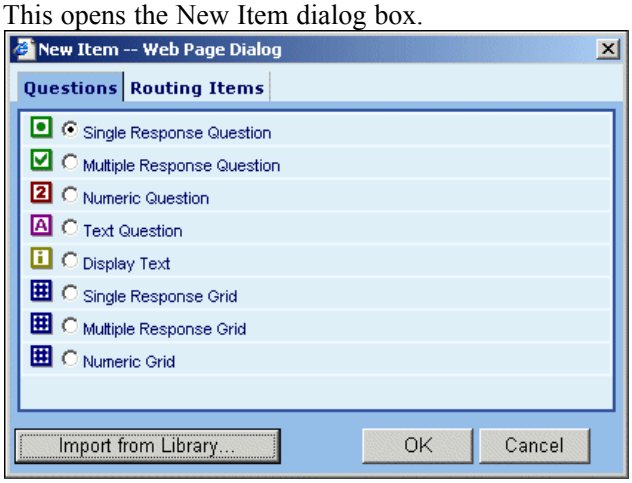
Display Text Items

Display Text items place text or other non-question information in the questionnaire. They are often used for general instructions to the interviewer or respondent.

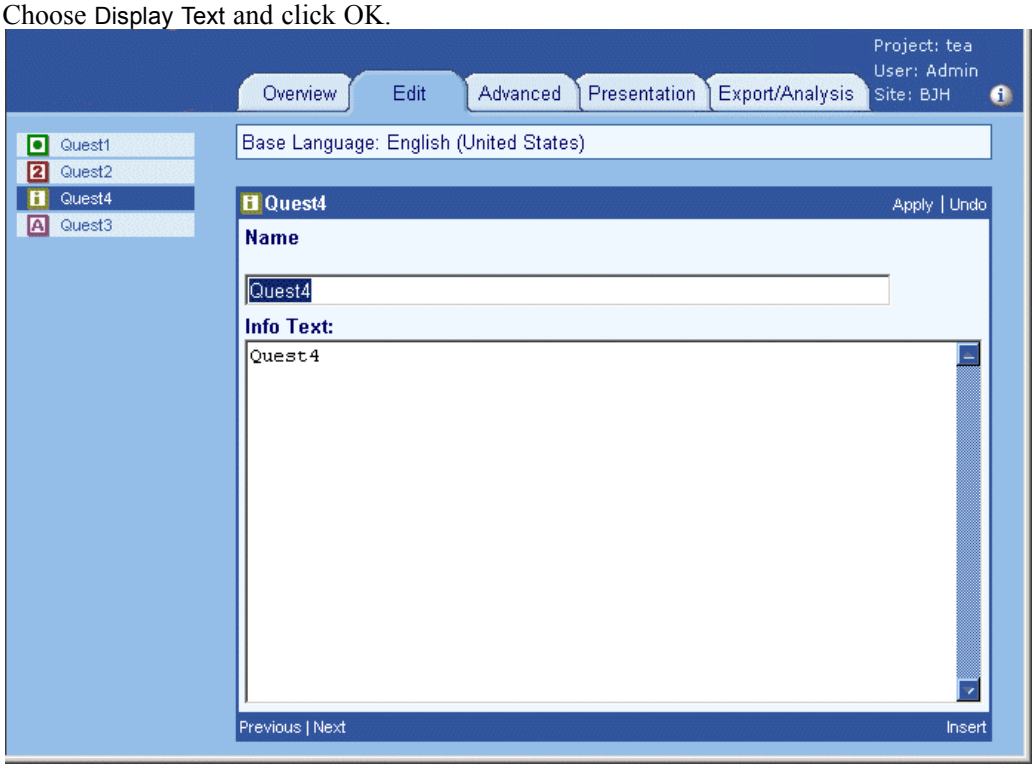
To Create a Display Text Item

▶ Click Insert Item.

This opens the New Item dialog box.



▶ Choose Display Text and click OK.

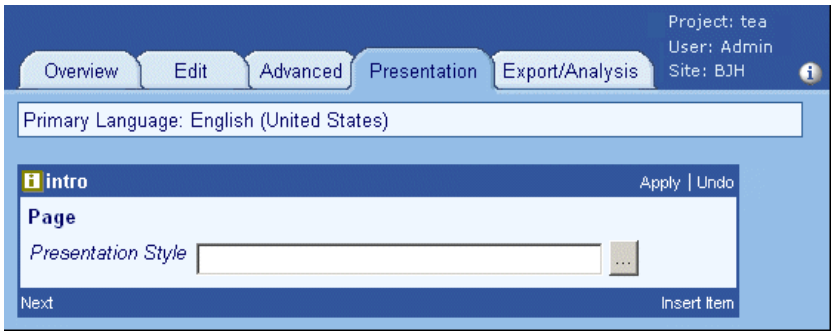


▶ In Name, optionally replace the default item name with a name of your choice.

▶ In Display Text, type the text you want to use.

To Set Presentation Options

▶ Select the Presentation tab.



- In Presentation Style, select a layout template:
  - Click the button next to the empty box.
  - On the Select page, locate the template file and click Select. For more information, see the topic Copying Pictures and Presentation Templates on p. 50.

  The filename appears in the Presentation Style box.

Using the Questionnaire Library

The Library is the central storage place for questionnaires or questionnaire sections that you want to make available for inclusion in other questionnaires. For example, if most of the questionnaires that your company creates have a standard set of demographic questions, it makes sense to store them in the library so that they can be imported into every questionnaire. This saves time and ensures that the questions are identical in all questionnaires.

The standard Questionnaire Library is divided into two sections. The Shared section (*FMRoot\Shared\Questionnaire Library Items*) contains questionnaires that are available to anyone who uses Build. The Roles section is divided into subfolders containing questionnaires that are accessible only by members of a particular role; so, for example, only members of RoleA will be able to access questionnaires saved in the RoleA area of the library (FMRoot\Roles\RoleA\Questionnaire Library Items).

Note: Build does not support personal libraries, although if a role has only one member that library is effectively a personal library.

Build comes with a collection of predefined surveys that are installed in different folders within the Shared section of the library. Some questionnaires are complete and ready to use with no further design work required, while others require minor customization such as replacing a marker for a company name or product with your own company or product name. A third group are smaller questionnaires that you would probably import into your own questionnaire files and then expand to form more detailed surveys.

The exact structure of the main library sections will be determined by the person responsible for maintaining the library, but it will probably consist of a number of folders for different types of questionnaires. Each folder may contain subfolders or questionnaires, in much the same way that you organize your files on your hard drive. You can use the library in the following ways:

- Save your own questionnaires to existing folders in the library.
- Import library questionnaires into questionnaires that you are designing.

Saving Questionnaires to the Library

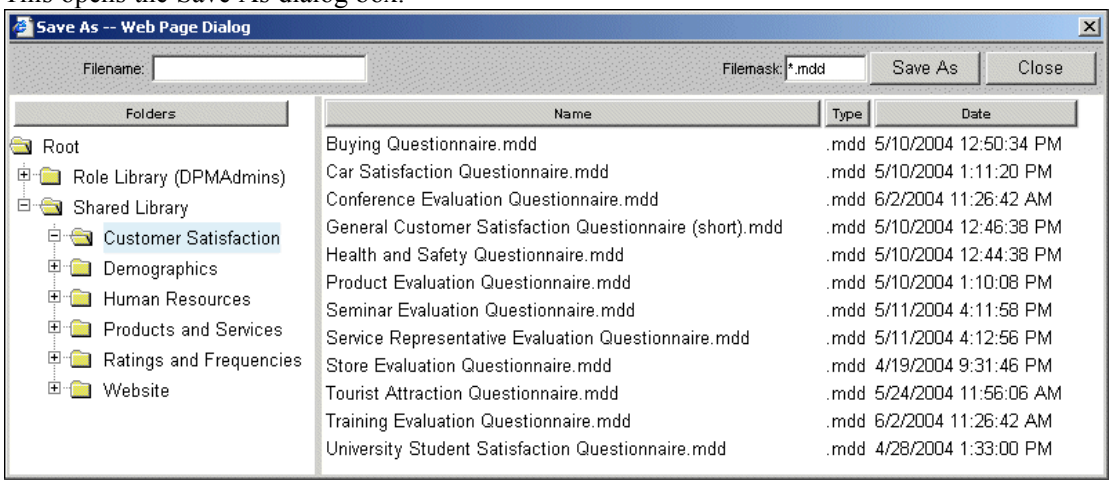
You can save the questionnaire you are working on as a library file. Once the file has been created, the questionnaire remains open for you to work on. Any changes that you make are only saved to the questionnaire file in the project's folder within your IBM® SPSS® Data Collection Interviewer Server Administration user folder; the library copy of the questionnaire is not updated unless you re-save the questionnaire to the library.

All files in the library are available to anyone who uses Build. However, the questionnaires do not become available to users of other Interviewer Server Administration activities until you check the files in to the Shared folder manually or run an activity that does this automatically.

If you add a questionnaire file that uses a template to the library, you will need to create a separate folder within the library to store the template and any files that the template uses, and then copy those files into that folder manually. (Later versions of Build will do this automatically.) Instructions for doing this are available in Copying Questionnaires that use Templates to the Library but you may prefer to ask your administrator to do this for you.

- Choose:
  File > Add To Library

  This opens the Save As dialog box.


Save As -- Web Page Dialog
Filename:
Filemask: *.mdd
Save As
Close
Folders
Root
Role Library (DPMAdmins)
Shared Library
Customer Satisfaction
Demographics
Human Resources
Products and Services
Ratings and Frequencies
Website
Name
Type
Date
Buying Questionnaire.mdd .mdd 5/10/2004 12:50:34 PM
Car Satisfaction Questionnaire.mdd .mdd 5/10/2004 1:11:20 PM
Conference Evaluation Questionnaire.mdd .mdd 6/2/2004 11:26:42 AM
General Customer Satisfaction Questionnaire (short).mdd .mdd 5/10/2004 12:46:38 PM
Health and Safety Questionnaire.mdd .mdd 5/10/2004 12:44:38 PM
Product Evaluation Questionnaire.mdd .mdd 5/10/2004 1:10:08 PM
Seminar Evaluation Questionnaire.mdd .mdd 5/11/2004 4:11:58 PM
Service Representative Evaluation Questionnaire.mdd .mdd 5/11/2004 4:12:56 PM
Store Evaluation Questionnaire.mdd .mdd 4/19/2004 9:31:46 PM
Tourist Attraction Questionnaire.mdd .mdd 5/24/2004 11:56:06 AM
Training Evaluation Questionnaire.mdd .mdd 6/2/2004 11:26:42 AM
University Student Satisfaction Questionnaire.mdd .mdd 4/28/2004 1:33:00 PM

- In the left-hand frame, expand the library tree and select the folder in which you want to store the questionnaire.
- In Filename, type the name that the questionnaire will have in the library.
- Click Save As.

  Build confirms that the questionnaire is now part of the library.
- Click OK to close the message box and return to the questionnaire design page.

Importing Library Questions into the Current Questionnaire

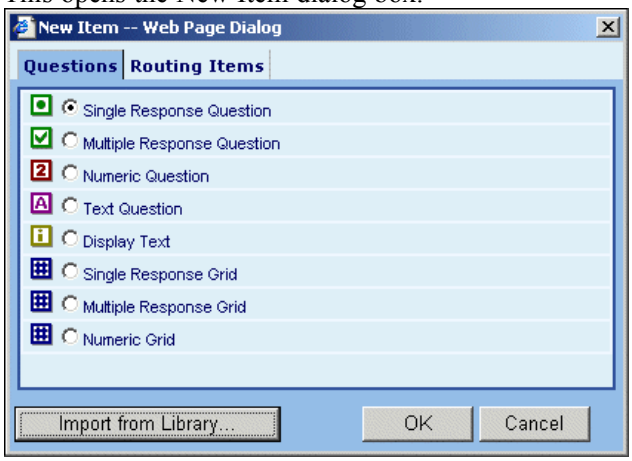
When you import a library questionnaire into the current questionnaire, Build compares the names of the items it is importing against the names of items in the current questionnaire. If any of the item names already exists, Build appends a number to the item's name so that it still has a unique name.

▶ Do one of the following:

Either:

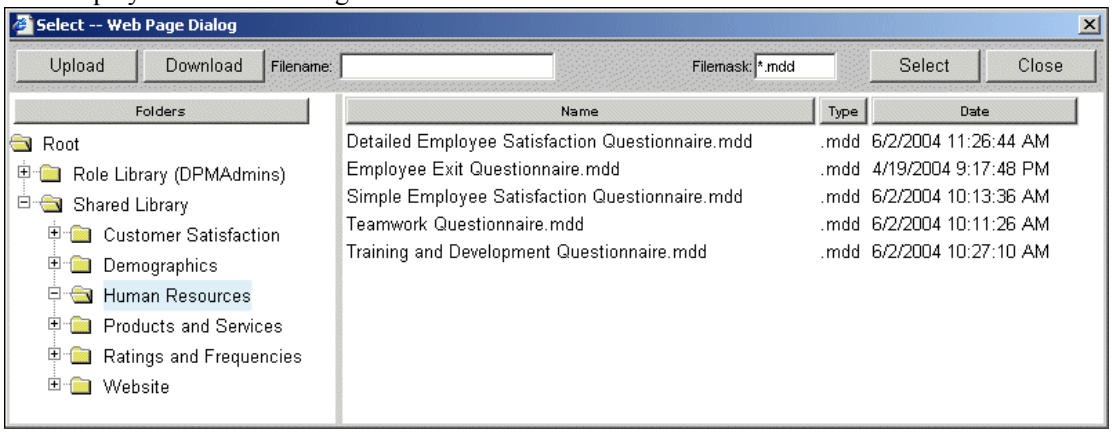
- On any tab, click Insert item at the point you want to insert the question.

This opens the New Item dialog box.



- Click Import from Library.

This displays the Select dialog box.



Or:

- On the Overview tab, select the item above which you want to insert the library file.
- Choose:

File > Insert > From Library

This displays the Select dialog box.

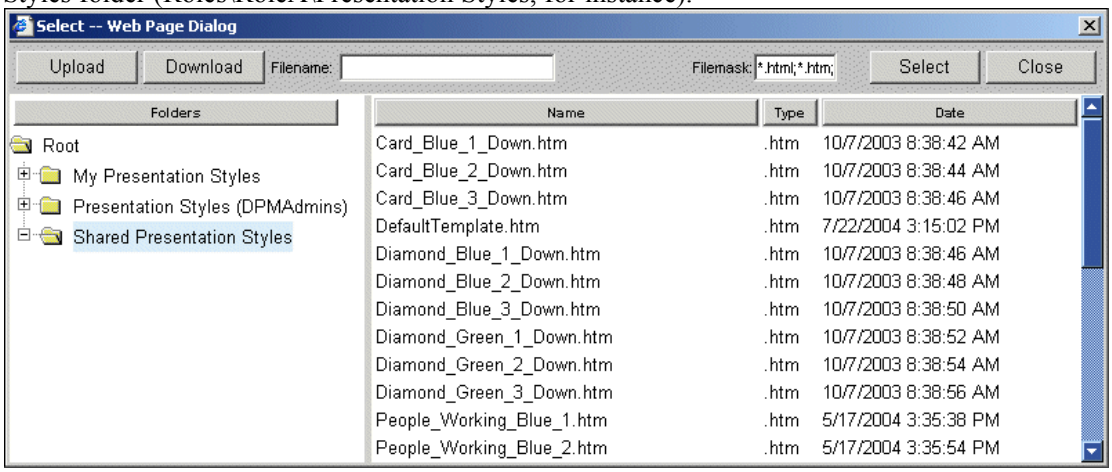
- In the Folders frame, navigate to the folder containing the file you want to import.
- In the file list, double click on the filename.

  Build inserts the items from the library file at the current point in the questionnaire.

Copying Pictures and Presentation Templates

Build does not use the library for storing shared pictures and presentation templates, although it uses a similar structure of folders and subfolders for templates.

Build stores templates that are available to all users in a Shared Presentation Styles folder, and templates that are available to all members of a particular role in a role-specific Presentation Styles folder (Roles\RoleA\Presentation Styles, for instance).



The Presentation Styles folder represents the project's folder in your IBM® SPSS® Data Collection Interviewer Server Administration user folder, so it points to a different location depending on the project you are working on. If you have templates that are specific to the current project this is where to store them so that the Launch activity can find them.

Build does not have a central repository for picture files. Instead, it looks for them in a folder that it refers to as My Images. This corresponds to the project's folder within your Interviewer Server Administration user folder, so My Images for project 1 is not the same as My Images for project 2.

When you click the button for associating a picture with a response, or a presentation template with a question, the dialog box that you see displays all the files that are available for this project. Some will be shared and others will be specific to the current project. If the file you want is not listed, you will need to upload it before you can use it.

You can also download files onto your computer if you need to edit them, for example, if you want to change a template's page layout or color scheme. Once you have made your changes, you can upload the file to replace the original, or rename it and then upload it.

To Upload a File into the Project's Folder

- On the Select dialog box, click Upload.

  This opens a standard Windows Choose file dialog box.

- Locate the file you want to upload and click Open.

  The file's name is added to the list of filenames on the right of the Select dialog box and can now be selected for use in Build.

To Download a File from the Project's Folder

- On the Select dialog box, choose the file you want to download from the list of filenames on the right of the dialog box.

- Click Download.

  This opens a standard Windows File Download dialog box.

- Either click Open to open the file from its current location or click Save to save the file in a location of your choice.

Non-Question Items

You can add the following non-question items to your questionnaires:

- Notes. for inserting general comments about the questionnaire.
- Bookmarks for naming specific locations in the questionnaire.
- Mandatory and conditional routing for jumping over questions that are not appropriate for the current respondent..
- Exit codes for forcibly terminating the interview.
- IOM script items for inserting Routing statements written in the Interview Scripting language directly into the questionnaire.

There is also an Insert from Script Library item for inserting Routing statements from a library file.

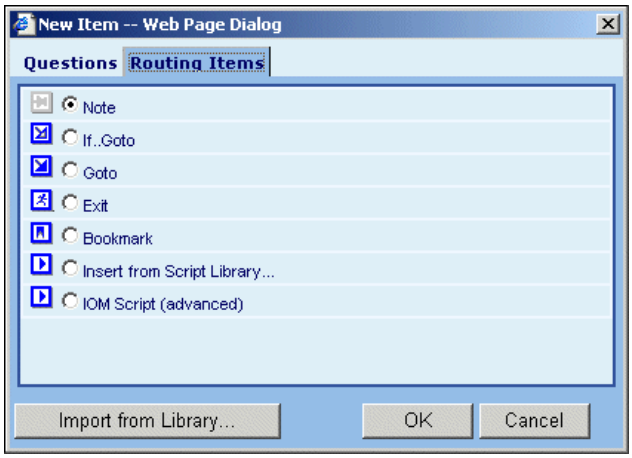
Notes

Use a Note item when you want to include notes or other information that is not part of the questionnaire. Typically, you might use this item type to make notes about further work that needs to be done on the questionnaire, or on special information about the questionnaire that needs to be recorded for future reference.

- Click Insert Item.

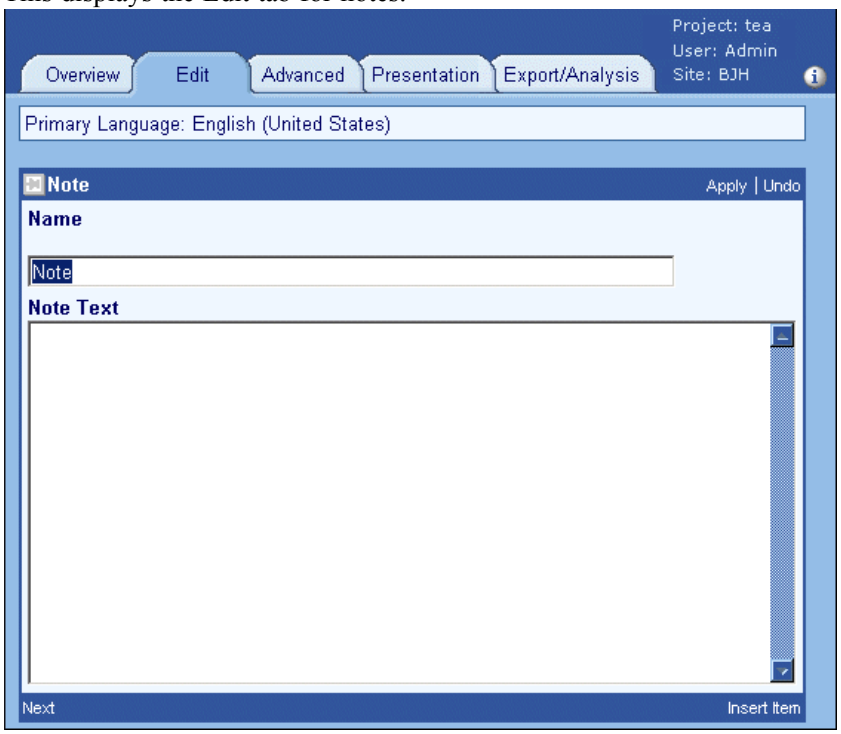
  This opens the New Item dialog box.

- Select the Routing Items tab.



- Choose Note and click OK.

  This displays the Edit tab for notes.



- In Name, optionally replace the default item name with a name of your choice.
- In Note Text, type the note.

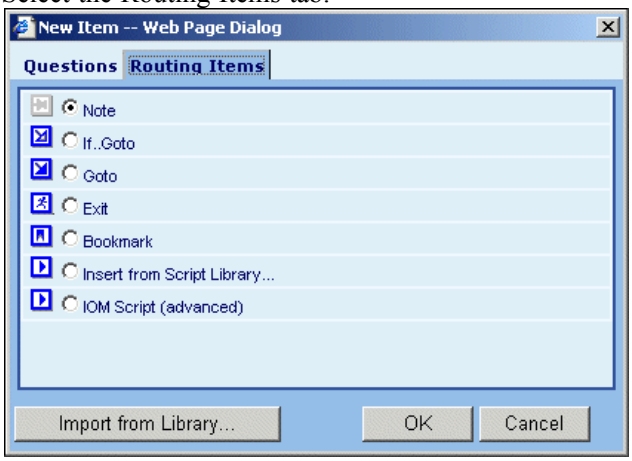
Bookmarks

The bookmark item identifies a particular point in the questionnaire with a unique name. It is most commonly used in large or complex questionnaires, where respondents can reach a certain point in the questionnaire via a number of routes. By placing a bookmark in the questionnaire, you can easily gather all respondents together before proceeding with the rest of the questionnaire. Bookmarks are also useful as destinations for Gotos, when you do not want to jump directly to a question.

- Click Insert Item.

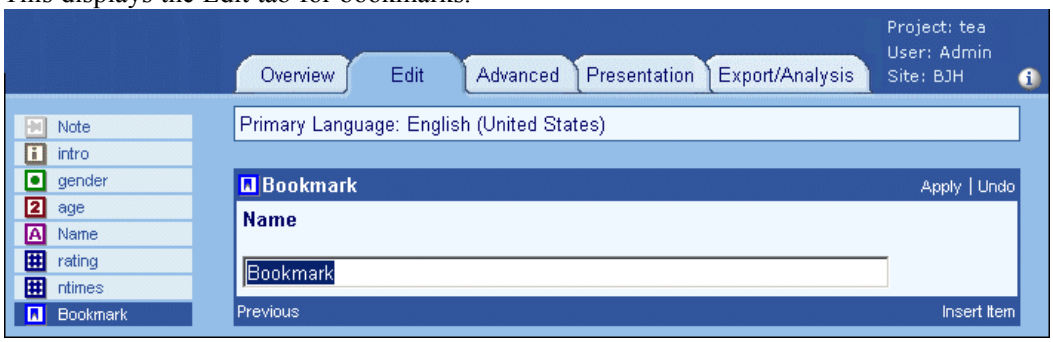
  This opens the New Item dialog box.

- Select the Routing Items tab.



- Choose Bookmark and click OK.

  This displays the Edit tab for bookmarks.



- In Name, optionally replace the default item name with a name of your choice.

Goto

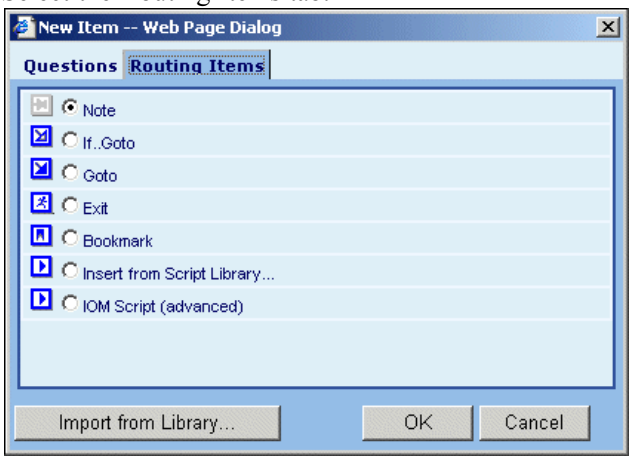
A Goto applies to all respondents who reach this point in the questionnaire. You might use it in a questionnaire that has many sections, where each respondent answers the questions in one section plus a general demographic section only. To ensure that each respondent skips the unwanted

sections and reaches the demographic section, you could end each section with a Goto that takes the respondent straight to the start of the demographic section.

- Click Insert Item.

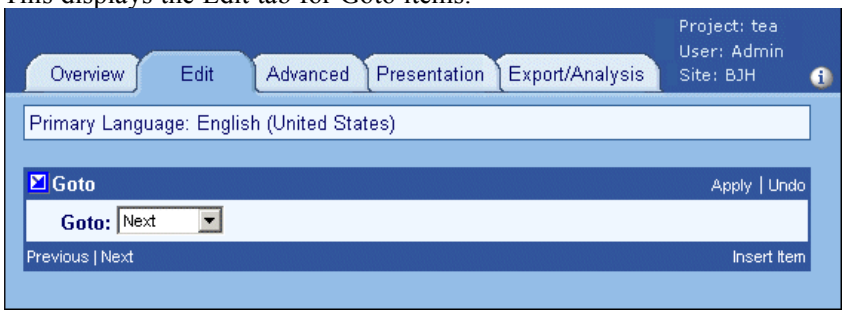
  This opens the New Item dialog box.

- Select the Routing Items tab.



- Choose Goto and click OK.

  This displays the Edit tab for Goto items.



- Select the question that you want to go to from the dropdown list.

If ... Goto

Use an If...Goto to define routing for some respondents but not others. You specify the respondents to which the Goto applies by listing responses that they must have given to previous questions. For example, to create an If...Goto that applies to women, you might say that the response to the Gender question must be Female. The questions and answers that control an If...Goto are commonly called the *routing condition* because they define the conditions under which the Goto will be followed.

A routing condition can specify a single condition or a list of conditions. If you specify more than one condition, you must also specify how each condition relates to the next one in the list. Conditions can be related to one another using And or Or. Use And when respondents must satisfy both conditions; use Or when respondents must satisfy at least one of the conditions.

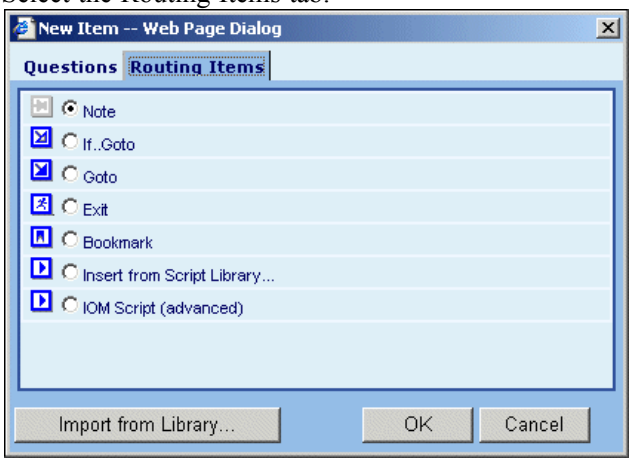
The Advanced tab displays the routing condition as a text expression. If you are familiar with the expression definition language, you can make changes to the expression on this tab, and will be able to use the full expression syntax to define more complex expressions than are possible on the Edit tab.

To Define Conditional Routing

- Click Insert Item.

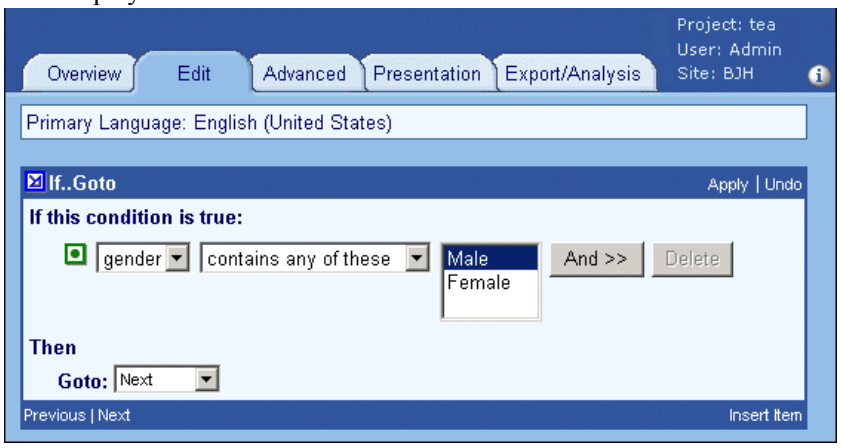
  This opens the New Item dialog box.

- Select the Routing Items tab.



- Choose If...Goto and click OK.

  This displays the Edit tab for If...Goto items.



- Choose a question name from the dropdown list of question names.

- Choose a condition from the dropdown list of conditions. The contents of this list will vary according to the type of question you chose.
- The value box (the third box) varies according to the type of question you chose. For a single or multiple choice question, select a response from the dropdown list. For a numeric or text question, type a number or text in the box.
- If you want to define another condition, click And.

  A second condition definition line is displayed, and the And button that you clicked changes to a dropdown box so you can choose how the two conditions are to be combined.
- If you want the new condition to be combined with the previous condition using Or rather than And, select Or from the dropdown list in the previous line.
- Define the next condition as you did the first one.
- Repeat these steps until you have fully defined the conditions under which the routing should take place. If you make a mistake, click Delete to delete an incorrect line from the specification.
- In Goto, select the question or other item that you want to jump to if the condition is true.

Exit Codes

The Exit item lets you terminate an interview immediately and flag it with an exit code of your choice. When you analyze the data you can use the exit code as a means of filtering the data to include only interviews that terminated in a certain way, or to provide simple counts of the various ways in which interviews were terminated.

Build provides a standard set of exit codes but also allows you to define your own codes with your own meanings. Exit codes may be any whole number in the range 0 to 2147483647.

Predefined exit codes are as follows:

Code	Meaning	Remarks
1	Successful completion	Any interview in which all relevant questions have been asked is flagged as successfully completed. This is the default.
2	Premature termination with data.	You can use this code to identify interviews that were not completed for whatever reason. This is a useful exit code for paper questionnaires or CATI surveys where the respondent can simply choose not to continue answering questions. It allows you to differentiate between these interviews and interviews that were stopped, where the respondent may have had the intention of continuing with the interview.

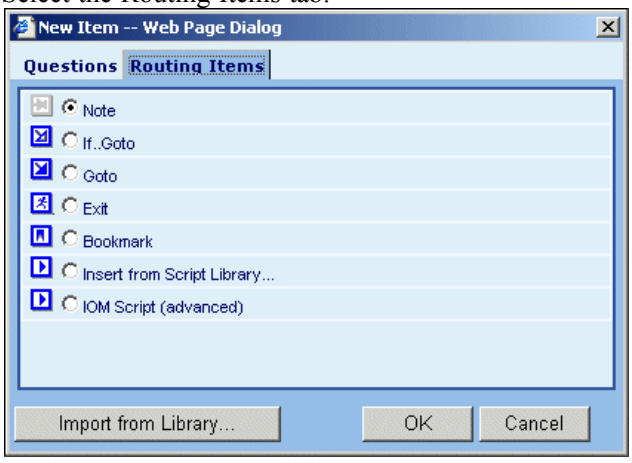
Code	Meaning	Remarks
5	Terminated by quota control	Interviews that are terminated by quota control can often be confused with successfully completed or partially completed interviews. Use this exit code to flag interviews that were terminated because the respondent belonged in a group whose quota had already been filled.
6	Early completion	You can use this code to treat an interview that is only partially completed as if it were a fully completed interview. You might decide to do this if the respondent has reached a certain point in the questionnaire.
8	Premature termination without data	This code is not applicable to IBM® SPSS® Data Collection products, which always write data.
9	Interview stopped with no data written	This code is not applicable to Data Collection products, which always write data.
10	Interview stopped with data written	You can use this code to identify interviews that have been stopped pending completion at a later date.

To Define an Exit Code

- Click Insert Item.

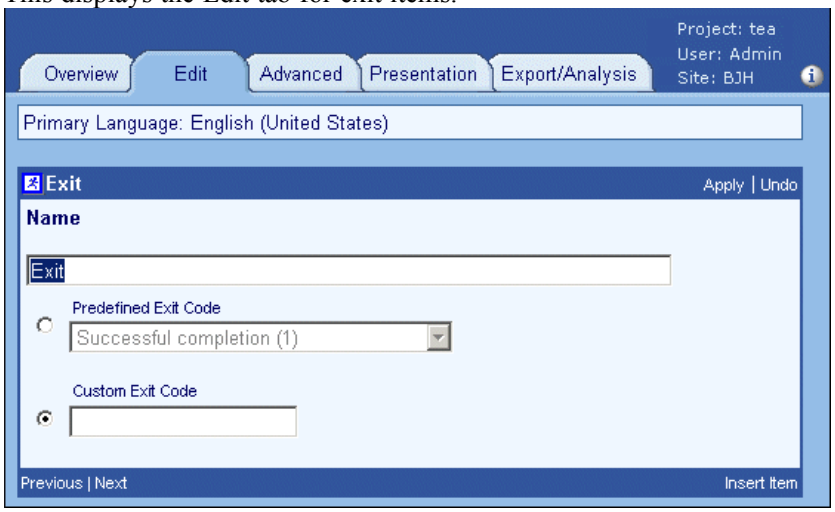
  This opens the New Item dialog box.

- Select the Routing Items tab.



- Choose Exit and click OK.

  This displays the Edit tab for exit items.



- In Name, optionally replace the default item name with a name of your choice.
- To use a predefined exit code, click Predefined Exit Code and select a code from the dropdown list.
- To use a code of your choice, click Custom Exit Code and type a number in the input box.

Interview Scripting Items

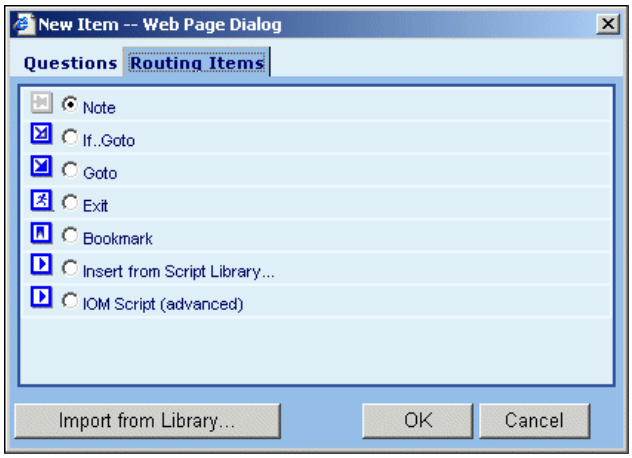
Use an IOM Script item when you want to insert statements directly into the Routing section of the questionnaire. The Routing section controls the order and way in which questions are presented to respondents. Statements in this section must be written in the Interview Scripting Language which you will find documented in *IBM® SPSS® Data Collection Developer Library*.

To Create an IOM Script Item

- Click Insert Item.

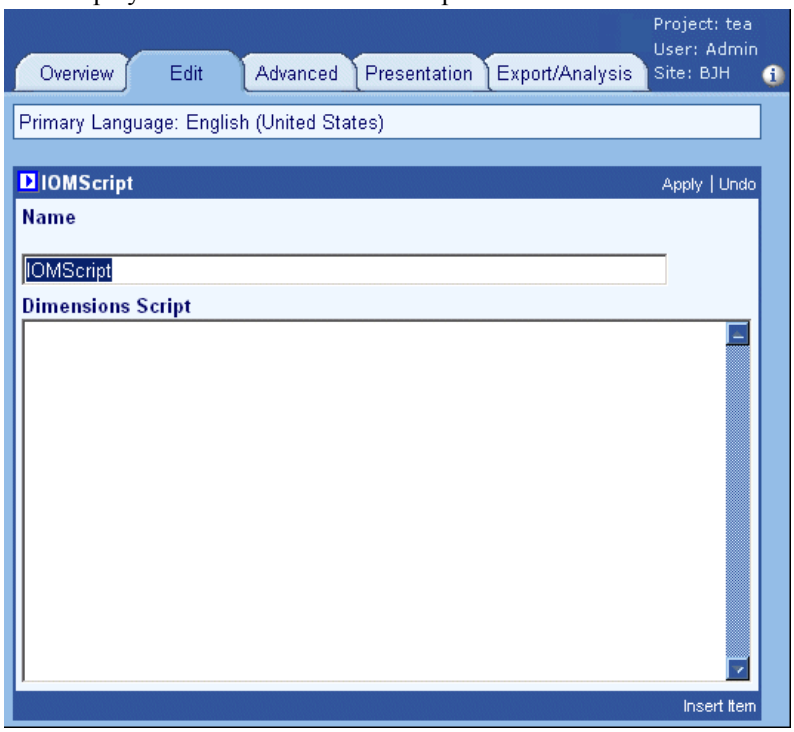
  This opens the New Item dialog box.

- Select the Routing Items tab.



- Choose IOM Script and click OK.

  This displays the Edit tab for IOM script items.



- In Name, optionally replace the default item name with a name of your choice.
- In IOM Script, type the mrScriptBasic code exactly as you want it to appear in the IBM® SPSS® Data Collection script file.

Inserting Routing Code from the Script Library

When you create a questionnaire, Build saves the questionnaire definition in two sections. The Metadata section contains the questions, and the Routing section contains statements that display or print the questions in the order they appear on the Overview tab. In most surveys, you'll want to do more than this. For example, you might want to add a page banner to display the survey title at the top of each page, or you'll want to present a block of questions in a different order for each respondent. These and other such tasks are controlled by the Routing section of the questionnaire.

You can always use an IOM Script item to insert statements in the Routing section, but Build comes with a library of script snippets for common tasks that you can load into the questionnaire. Some of these script snippets can be used exactly as they are, but others will need to be modified once they have been loaded, for example, to replace dummy question or response names with the corresponding names from your questionnaire. Each script file is named according to what it does and contains comments explaining how it should be used.

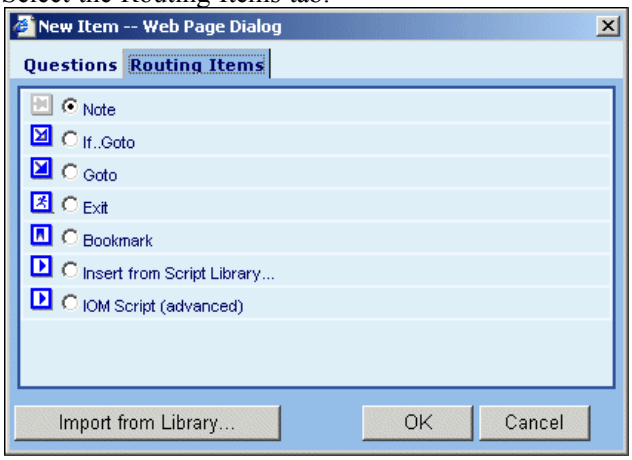
When you insert statements in this way, Build creates a single IOM Script item for all the statements in the file. You can then edit these statements in the usual way if necessary.

To Insert Code from the Script Library

▶ Click Insert Item.

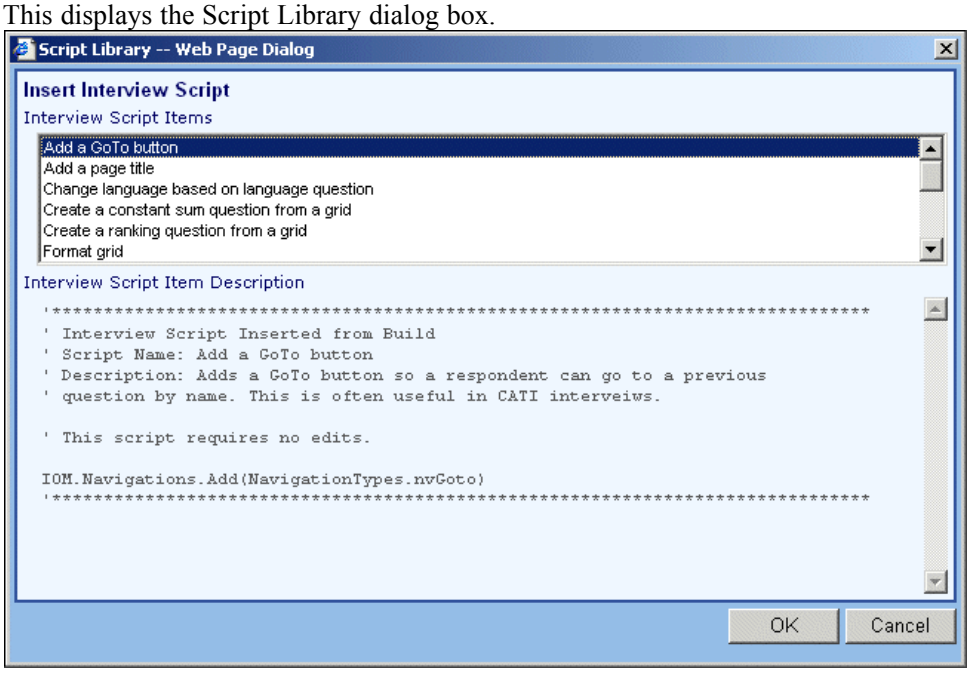
This opens the New Item dialog box.

▶ Select the Routing Items tab.



- Choose Insert from Script Library and click OK.

  This displays the Script Library dialog box.


Script Library -- Web Page Dialog
Insert Interview Script
Interview Script Items
Add a GoTo button
Add a page title
Change language based on language question
Create a constant sum question from a grid
Create a ranking question from a grid
Format grid
Interview Script Item Description
' Interview Script Inserted from Build
' Script Name: Add a GoTo button
' Description: Adds a GoTo button so a respondent can go to a previous
' question by name. This is often useful in CATI interveiws.
' This script requires no edits.
IOM.Navigations.Add(NavigationTypes.nvGoto)
OK
Cancel

- In the Interview Scripts frame, select the script you want to use.

  The script is displayed in the Interview Script Item Description frame.

- Click OK to insert the script statements in the questionnaire.

- If the script indicates that it requires customization, make the necessary changes.

Language Codes for the Change Language Script Snippet

The following table shows the 3-character language codes for many of the world's languages.

Code	Language
AFK	Afrikaans
SQI	Albanian
ARG	Arabic - Algeria
ARH	Arabic - Bahrain
ARE	Arabic – Egypt
ARI	Arabic – Iraq
ARJ	Arabic – Jordan
ARK	Arabic – Kuwait
ARB	Arabic – Lebanon
ARL	Arabic – Libya
ARM	Arabic – Morocco
ARO	Arabic – Oman
ARQ	Arabic – Qatar

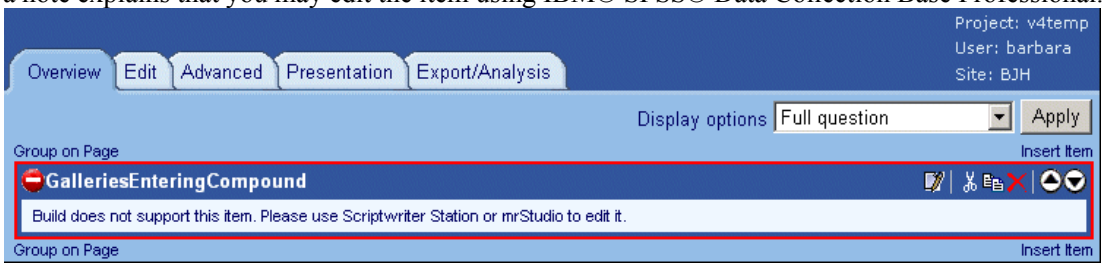
Code	Language
ARA	Arabic – Saudi Arabia
ARS	Arabic – Syria
ART	Arabic – Tunisia
ARU	Arabic – United Arab Emirates
ARY	Arabic – Yemen
HYE	Armenian
EUQ	Basque – Basque
BEL	Belarusian
BGR	Bulgarian
CAT	Catalan
CHS	Chinese
ZHH	Chinese – Hong Kong, SAR
ZHI	Chinese – Singapore
CHT	Chinese – Taiwan
HRV	Croatian – Croatia
CSY	Czech
DAN	Danish
NLB	Dutch – Belgium
NLD	Dutch – The Netherlands
ENA	English – Australia
ENL	English – Belize
ENC	English – Canada
ENB	English – Caribbean
ENI	English – Ireland
ENJ	English – Jamaica
ENZ	English – New Zealand
ENS	English – South Africa
ENT	English – Trinidad
ENG	English – United Kingdom
ENU	English – United States
ETI	Estonian – Estonia
FOS	Faroese – Faroe Islands
FAR	Farsi
FIN	Finnish
FRB	French – Belgium
FRC	French – Canada
FRA	French – France
FRL	French – Luxembourg
FRS	French – Switzerland
DEA	German – Austria
DEU	German – Germany
DEC	German – Liechtenstein
DEL	German – Luxembourg
DES	German – Switzerland

Code	Language
ELL	Greek
HEB	Hebrew
HIN	Hindi
HUN	Hungarian
ISL	Icelandic
IND	Indonesian
ITA	Italian – Italy
ITS	Italian – Switzerland
JPN	Japanese
KOR	Korean
LVI	Latvian
LTH	Lithuanian
MSL	Malay – Malaysia
NOR	Norwegian (Bokmal)
NON	Norwegian (Nynorsk)
PLK	Polish
PTB	Portuguese – Brazil
PTG	Portuguese – Portugal
ROM	Romanian – Romania
RUS	Russian – Russia
SRB	Serbian (Cyrillic)
SRL	Serbian (Latin)
SKY	Slovak
SLV	Slovenian
ESS	Spanish – Argentina
ESB	Spanish – Bolivia
ESL	Spanish – Chile
ESO	Spanish – Colombia
ESC	Spanish – Costa Rica
ESD	Spanish – Dominican Republic
ESF	Spanish – Ecuador
ESE	Spanish – El Salvador
ESG	Spanish – Guatemala
ESH	Spanish – Honduras
ESM	Spanish – Mexico
ESI	Spanish – Nicaragua
ESA	Spanish – Panama
ESZ	Spanish – Paraguay
ESR	Spanish – Peru
ESU	Spanish – Puerto Rico
ESY	Spanish – Uruguay
ESV	Spanish – Venezuela
SVF	Swedish – Finland
SVE	Swedish – Sweden

Code	Language
THA	Thai – Thailand
TRK	Turkish
URK	Ukrainian
URD	Urdu
VIT	Vietnamese – Vietnam

Unsupported Items

If you load a questionnaire or script snippet that has been created outside of Build and it contains items that Build does not support, Build flags the item with a "no entry" sign. On the Overview tab, a note explains that you may edit the item using IBM® SPSS® Data Collection Base Professional.



Inserting IBM SPSS Data Collection WordCapture Files into the Current Questionnaire

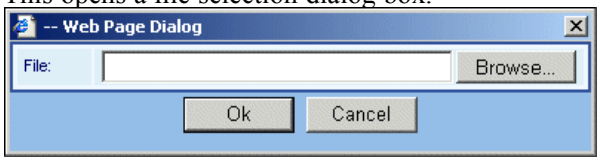
If you have a questionnaire (*.mdd*) file that was created in IBM® SPSS® Data Collection WordCapture you can insert it into a Build questionnaire in the same way that you might insert files from the library.

When you insert an external file into the current questionnaire, Build compares the names of the items it is inserting against the names of items in the current questionnaire. If any of the item names already exists, Build appends a number to the item's name so that it still has a unique name. Similarly, if the base language for the inserted items is different to the base language of the current questionnaire, Build will tell you so that you can choose a different language if one is available.

- On the Overview tab, select the item above which you want to insert the new items.

File > Insert > From File

This opens a file selection dialog box.



- Use the Browse button to locate and select the file you want to insert. The file's name will appear in the File box.
- Click OK.

Build inserts the items from the library file at the current point in the questionnaire.

Editing Questionnaires

This section describes various techniques for changing the content and appearance of a questionnaire once the initial development stage is over. These include:

- General procedure for changing a question's definition
- Editing response and subject lists
- Saving and undoing changes
- Grouping questions that are to appear all on the same page
- Deleting questions
- Moving questions up and down
- Cutting and pasting questions
- Duplicating questions

The section also includes some useful information about editing Build questionnaires.

Changing Questions

- ▶ On the Overview tab, select the question you want to change.
- ▶ Select the Advanced or Presentation tab as appropriate.
- ▶ Make the changes, and click Apply on the question's display box.
- ▶ If necessary, switch to a different tab to make other changes.

Editing Response and Subject Lists

Responses are the texts that make up the list of possible responses to a categorical question or a categorical grid question. Subjects apply to categorical and numeric grid questions and are the sub-questions that you want to ask. For example, in a grid that asks the respondent to rate a number of brands, the brands are the subjects and the ratings, which are the same for all brands, are the responses. The facilities for editing responses and subjects are the same.

Each response or subject has a text and a name. The text is the text that you specify when you add the response or subject to the question, and it is what appears in the questionnaire that is used for interviewing. The same text can appear in a number of different questions.

The name is a label that uniquely identifies a particular text. Build generates these labels automatically, basing them on the response or subject text. The labels are used as variable names for storing data in the case data file, to ensure that variables, responses and subjects are consistent across different versions of the script. Any response that has the same name in all versions of a questionnaire is treated as being the same response even if the response texts have changed between versions. For example, if version 1 of the questionnaire has the response text 'Red' with the name Red and you change the response text to 'Reddish colors', there is no need to change the name in version 2 because this is still the same response. However, if you replace 'Red' with

'Blue' you must also change the name to 'Blue' otherwise the interviewing and analysis activities will treat Blue as if it were Red.

- *Note:* In general, although you may want to change response and subject texts, you should not need to change the names.

To Insert Responses or Subjects

▶ Select the response or subject above or below which the new response is to be inserted, and then click Insert Above Selection or Insert Below Selection as appropriate.

A new line is added to the list.

▶ In the Text column, replace the New Response text with the response text and then make any other adjustments that are necessary. For example, it is usually a good idea to replace the default name with a unique name that matches or is similar to the text in the Text column.

To Append Responses or Subjects

▶ Click Append.

A new line is added to the end of the list.

▶ In the Text column, replace the New Response text with the response text and then make any other adjustments that are necessary.

To Delete Responses or Subjects

▶ Select the responses' check boxes and then click Delete Selected. (To select all responses for deletion, click the check box at the start of the responses menu bar.)

To Move Responses or Subjects

▶ Select the response's check box and then click Move Up or Move Down as appropriate.

To Switch Multiple and Single Response Types

▶ Select the responses whose response type you want to change and then click Change to Single or Change to Multi.

Note: Change to Multi is available only if the question allows multiple responses to be chosen.

To Switch the Question Type Between Single and Multiple Response

▶ In Question Type, click Single or Multi as appropriate.

This changes all the individual response types in the Responses list to match the new question type, as well as changing the overall data type for the question.

Applying and Undoing Changes to the Current Question

Build automatically saves any changes you have made to the current question when the following events take place:

- When you move from the Edit, Advanced, or Presentation tab to another tab.

- When you are working on the Edit, Advanced, or Presentation tab and you choose a question from the question list or you click Next or Previous.
- When you click Insert Item or New List.
- When you move, group, ungroup, delete or paste questions on the Overview tab.
- When you are working on the Advanced tab and you move, add, or delete responses, subjects, or elements in a grid or categorical question.

Build does not save changes in the following situations:

- When you choose an option from the menu. For example, when you leave Build or when you open a new questionnaire when one is already open.
- When you choose a picture for a response on the Advanced tab, or when you choose a layout template on the Presentation tab.

Build provides Apply and Undo options on the Edit, Advanced, and Presentation tab for saving or undoing changes to the current question. If you are working on any of these tabs you may want to save your changes manually before taking the following actions:

- Previewing the questionnaire.
- Activating or testing the questionnaire.
- Saving the questionnaire to the library.
- Opening a new questionnaire.
- Leaving Build.

▶ Click Apply to save any changes you have made to the current question.

▶ Click Undo to undo any unsaved changes for the current question.

Note: If you are working on the Presentation tab for a grid question, you must click Apply after choosing the template (*.htm*) file before Build will search the template file for the name of the grid template (*.xml*) file.

Grouping Questions

You can link adjacent questions so that they form a Group. If you use the questionnaire with IBM® SPSS® Data Collection Interviewer Server, the questions in the group will all be displayed on the same page. The exceptions are questions whose Hide Question property is set to Yes.

Grouping questions changes the behavior of the down-arrow button on the first question in the group and the up-arrow button on the last question in the group so that they refer to the group rather than to the individual question. If you want to move the first or last question in the group, you must ungroup the question first.

The navigation buttons on other questions in the group remain unchanged, so you can move other questions within the group in the normal way. However, if you want to move a question out of the group you must ungroup it first.

Grouping questions also affects the contents of the Insert Item dialog box. If you insert an item in a group the Insert Item dialog box shows only the item types that are can be inserted in the page.

When you ungroup questions, Build removes the link at the point that you click. For example, if you click the Ungroup link after a question, the link between that question and the next question is broken. Depending on the question's position in the group, this may mean that the questionnaire now contains two smaller groups rather than one group.

To Group Questions

- On the Overview tab, click Group on Page between the two questions you want to group. If you want to group more than two questions, click on the first/last question in the group, then hold down the Ctrl key as you click on the last/first question in the group. Then click Group on Page anywhere between those two questions.

  A white line appears to the left of the grouped questions.

To Ungroup Questions

- On the Overview tab, click Ungroup between the question you want to ungroup and the question before or after it. If the question is in the middle of a group, you may need to ungroup the question from both the previous and the next questions in the group.

Deleting Questions

- On the Overview tab, navigate to the question you want to delete.
- Click the Delete button on the question's display box.

Moving Questions Up or Down

- On the Overview tab, navigate to the question you want to move.
- Click the arrow buttons on the question's display box to move the question up or down within the questionnaire.

Moving a Question using Cut and Paste

- On the Overview tab, click Cut on the question you want to move.
- Navigate to the question above or below which you want to insert the question and click Paste.

Duplicating a Question using Copy and Paste

- On the Overview tab, click Copy on the question you want to copy.
- Navigate to the question below which you want to insert the question and click Paste.

  The duplicate question is given a unique name which is the original name followed by a number.

Switching Between Build and IBM SPSS Data Collection Base Professional

When you create a questionnaire with Build, you define the questionnaire's contents by filling in online forms. As you do this, Build creates a questionnaire script (*.mdd*) file. The file has a metadata section that defines the questions and responses and a collection of routing items that specify how the questions and responses will be used in interviews (for example, the order in which questions will be asked, which questions will be asked of which respondents, and so on).

Build is designed to be easy to use and to provide facilities for creating the majority of questionnaires. There are some things that it cannot do, so your company may use IBM® SPSS® Data Collection Base Professional to create or edit questionnaires directly in the interview scripting language. Like Build, Base Professional creates an *.mdd* file with a metadata section and routing information, but there are differences that you should be aware of if you use Build and Base Professional on the same questionnaire file. These differences are as follows:

- There are some questionnaire items that you can create in Base Professional that you cannot create in Build. If you use Build on a questionnaire that contains these items, you will see them flagged as unsupported items. For more information, see the topic Unsupported Items on p. 64.
- Questionnaires created in Base Professional have a routing section that contains IBM® SPSS® Data Collection scripting code that determines how the questions in the metadata section are presented during interviews. The default routing section is called Web, but scriptwriters can create any number of different routing sections with different names if they wish.
- Questionnaires created in Build do not have a routing section. Instead, they have a collection of routing items. Only Build can write to these items. If you open a Build questionnaire in Base Professional, the application runs the mrRoutingScript DSC to translate the routing items into a routing script written in the Data Collection scripting language. The DSC calls this routing section Paper and makes it read-only because it is a generated section rather than something that exists in the *.mdd* file. You will be reminded that you will need to create a new routing section (or use the default Web routing section) and copy the contents of the Paper routing into it in order to run the questionnaire. For information on how to do this in Base Professional, see "Adding a Routing Context" in the Base Professional section of the IBM® SPSS® Data Collection Developer Library documentation.
- If you edit a Build questionnaire in Base Professional and you add or delete questions, the changes may not be visible in Build because Base Professional provides some functionality that is not available in Build. If you use Base Professional, and you want the questionnaire to work in Build, you should run the *CreatePaperRouting.mrs* script on the *.mdd* file before opening it in Build. If not, ask the original scriptwriter to do this for you. (The script is installed as part of the Data Collection Developer Library in [INSTALL_FOLDER]\IBM\SPSS\DataCollection\6\DDL\Scripts\General\mrScriptBasic.)
- Base Professional activate using the Web routing or another routing of your choice. Build activates from the Paper routing only.

Testing and Activating Questionnaires

If you are developing large or complex questionnaires it can be useful to test the questionnaire periodically as you build it. You can do this from within Build by selecting options from the Tools menu.

This section describes the following tasks:

- Testing the questionnaire.
- Activating the questionnaire for live interviewing using standard parameters.
- Activating the questionnaire using manually set parameters.
- Downloading the questionnaire file onto your computer.

Testing the Questionnaire

Use Build's Test option to activate the project in test mode and optionally run a test interview. Activating in test mode sets the project's Test Version property to be the latest version of the questionnaire, and its Active Version property to None.

The following things happen when you activate in test mode:

- Build generates a read-only Routing section for the questionnaire based on the questions it contains plus any statements you have placed in IOM Script items or loaded from the script library. The Routing section is called Paper. (Note that this differs from the default Routing section name used by IBM® SPSS® Data Collection Base Professional, which is Web.)
- The Launch activity activates the project. If the project's status is Inactive, the activation process changes it to Test.
- A dialog box displays the URL to use for running a test interview.

Note: You cannot run test interviews on projects whose status is Active. If you want to run test interviews on an active project you must run the View Survey Link activity from IBM® SPSS® Data Collection Interviewer Server Administration.

To Run a Test Interview

▶ Choose:
Tools > Activate > Test Mode

A message box reports the progress of the activation activity. When the process is complete, the message box displays a URL that you can use for running test interviews on this project.

▶ Click Copy to Clipboard to copy to URL onto your clipboard.

▶ Start a new browser session and paste the URL into the Address box to run an interview.

▶ When you have finished testing, click Close to close the message box.

Making the Questionnaire Live

Use Build's Go Live option to make the project available for live interviewing. When you select this option, the following actions take place:

- The Launch activity activates the project with the Active status.
- A dialog box displays the URLs to use for test or running live interviews.

Note: If the questionnaire was created in IBM® SPSS® Data Collection Author, with the default context of **routing**, when new questions are created in Build, the context **paper** is automatically created. The **paper** context includes questions created in both Author and Build. When you activate the questionnaire, **routing** is selected as the default context. Unless you manually change the context to **paper** the activated questionnaire will not include those questions created in Build.

To Make the Questionnaire Live

▶ Choose:
Tools > Activate > Go Live

A message box reports the progress of the activation activity. When the process is complete, the message box displays two URLs. One is for running test interviews; the other is for production interviewing.

▶ Click Close to close the message box.

Setting Activation Parameters Manually

Use Build's Advanced option to activate the questionnaire using activation parameters of your choice. When you select this option, the following actions take place:

- The Launch activity starts so that you can specify the parameters needed for activation (for example, whether the project uses Sample Management or Quota Control, and which Web pages to use for authentication).
- A dialog box displays the URLs to use for running test and live interviews.

Note: If the questionnaire was created in IBM® SPSS® Data Collection Author, with the default context of **routing**, when new questions are created in Build, the context **paper** is automatically created. The **paper** context includes questions created in both Author and Build. When you activate the questionnaire, **routing** is selected as the default context. Unless you manually change the context to **paper** the activated questionnaire will not include those questions created in Build.

To Specify Activation Parameters

▶ Choose:
Tools > Activate > Advanced

▶ The Launch activity starts. Specify the activation parameters you want to use and click Activate Now.

A message box reports the progress of the activation procedure. When the process is complete, the message box displays two URLS that can be used for interviewing on this project.

▶ If you want to run test interviews or paste a URL into a Web document, click the appropriate Copy to Clipboard to copy to the URLs onto your clipboard.

▶ Click Close to close the message box.

Downloading the Questionnaire onto your Computer

If you want to download a Build questionnaire (*.mdd*) file onto your computer, you can either use the Files activity or download it directly from Build. A common reason for downloading Build questionnaires is to make changes to the routing section of a IBM® SPSS® Data Collection questionnaire.

Build creates a simple Routing section based on the information you have entered for each question, plus any routing statements you have added using IOM Script items or the script library, but there may be other changes that you want to make that cannot be done in Build. The Routing section is called Paper and it is read-only. (Note that this differs from the default Routing section name used by IBM® SPSS® Data Collection Base Professional, which is Web.)

If you want to view the change the routing statements, you should download the questionnaire.

To Download a Questionnaire File

- Choose:
  Tools > Download Questionnaire

  This opens a standard Windows File Download dialog box.

- Click Open to open the questionnaire file in IBM® SPSS® Data Collection Questionnaire Viewer, or Save to save it in a location of your choice.

To View the Routing Section

- Download the questionnaire file, open it in Base Professional and select the Paper tab.

To Change the Routing Section

- Download the questionnaire file and open it in Base Professional.
- Create a new Routing section with a unique name.
- On the Paper Routing tab, select any statements that you want to use in the new Routing section and copy them onto the new tab.
- Make your changes to the statements on the new tab.
- When you activate the project, change the default routing context to point to the name of your new Routing section.

  Refer to the Base Professional and Interview Scripting sections of *IBM® SPSS® Data Collection Developer Library* for further information on these steps.

Running Build Outside IBM SPSS Data Collection Interviewer Server Administration

You run Build outside IBM® SPSS® Data Collection Interviewer Server Administration when you want to create or edit library files that are not related to a specific project. When you do this, the following additional options are available in the File menu:

New. Lets you choose whether to create a new file or whether to use an existing library file as a starting point.

Open. Lets you open any questionnaire to which you have access.

Save As. Lets you save the questionnaire with a new name.

Save Copy As. Lets you save the questionnaire with a new name but continue working on the original file.

To Run Build Outside Interviewer Server Administration

- Type http://servername/SPSSMR/InterviewBuilder

  The Interviewer Server Administration login page is displayed.

- Enter your Interviewer Server Administration user name and password and click Login.

  Build starts and the main screen is displayed.

Creating a New Questionnaire or Library File

If you are using Build outside IBM® SPSS® Data Collection Interviewer Server Administration, you can create a new questionnaire or library file as a blank file or based on an existing library file of your choice.

To Create a Blank File

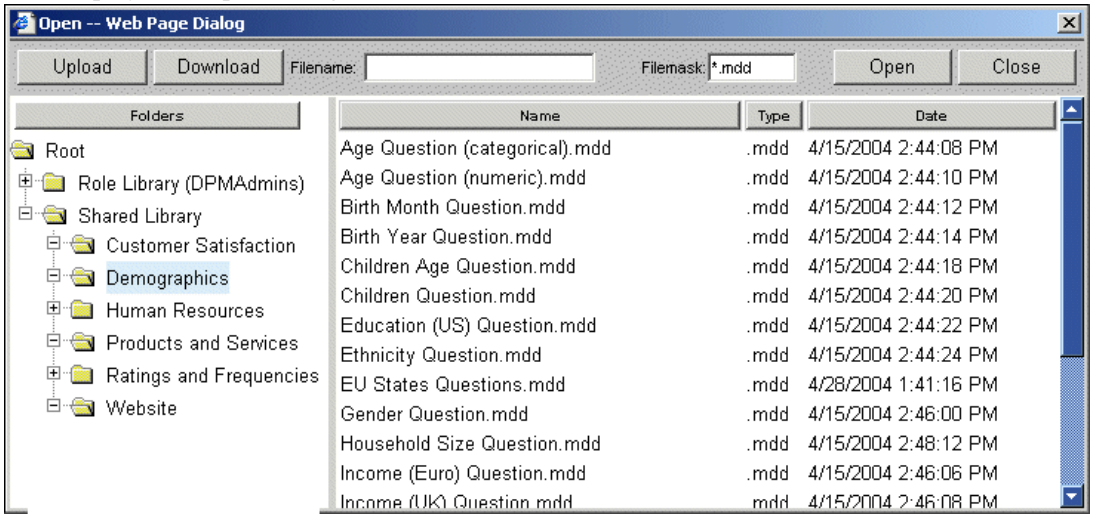
- Choose:
  File > New > Blank

  The Build start-up page is displayed with links for inserting a new question or a shared list.

To Base the New Questionnaire on a Library File

- Choose:
  File > New > Base on Library

  This displays the Open dialog box.



- In the Folders frame, navigate to the folder containing the file you want to use.
- In the right-hand frame, double-click on the file you want to load.

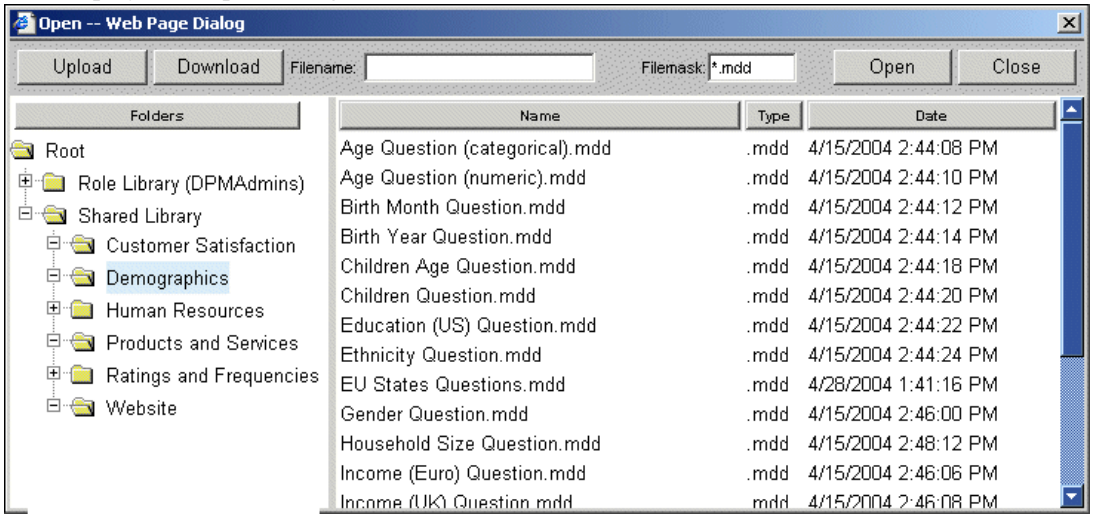
  Build inserts the questions from they library file into the current questionnaire.

Opening an Existing Questionnaire

If you are working outside IBM® SPSS® Data Collection Interviewer Server Administration, you can open any questionnaire to which you have access. This option is not available when you start Build from Interviewer Server Administration because then Build automatically opens the questionnaire for the currently selected project.

- Choose:
  File > Open

  This displays the Open dialog box.



- In the Folders frame, navigate to the folder containing the questionnaire you want to work on.
- In the right-hand frame, double-click on the questionnaire you want to open.

  Build opens the questionnaire definition file and displays a summary on the Overview tab.

Saving a Questionnaire

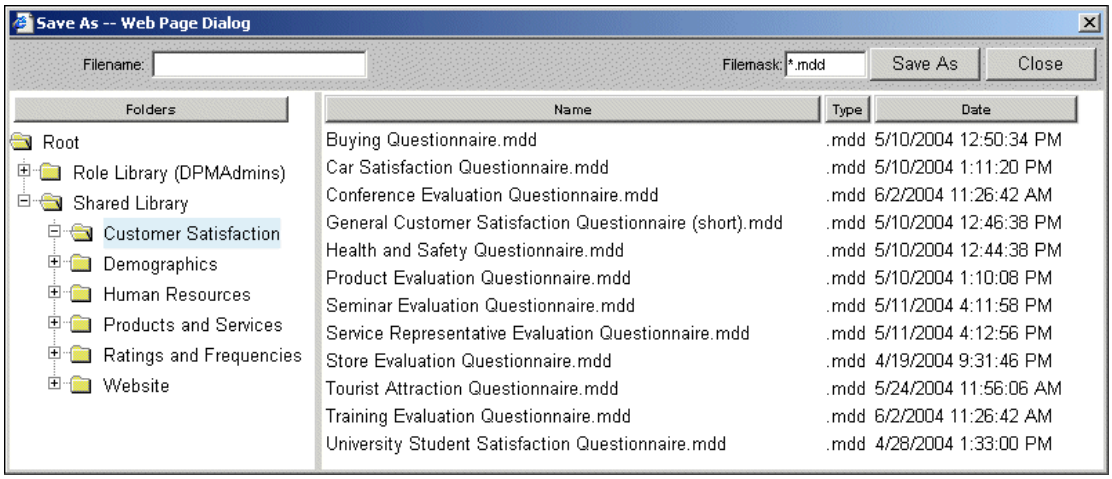
If you are working outside IBM® SPSS® Data Collection Interviewer Server Administration, you can save the questionnaire with a new name. You will normally do this when you want to create a new library file based on the contents of an existing questionnaire or library file.

Build saves the original questionnaire with its new name and then closes the original file and opens the new one. If you want to save the questionnaire with a new name without opening the new file, use Save Copy As instead.

- Choose either
  File > Save As

  or
  File > Save Copy As

  This opens the Save As dialog box.


Save As -- Web Page Dialog
Filename:
Filemask: *.mdd
Save As
Close
Folders
Root
Role Library (DPMAdmins)
Shared Library
Customer Satisfaction
Demographics
Human Resources
Products and Services
Ratings and Frequencies
Website
Name
Type
Date
Buying Questionnaire.mdd .mdd 5/10/2004 12:50:34 PM
Car Satisfaction Questionnaire.mdd .mdd 5/10/2004 1:11:20 PM
Conference Evaluation Questionnaire.mdd .mdd 6/2/2004 11:26:42 AM
General Customer Satisfaction Questionnaire (short).mdd .mdd 5/10/2004 12:46:38 PM
Health and Safety Questionnaire.mdd .mdd 5/10/2004 12:44:38 PM
Product Evaluation Questionnaire.mdd .mdd 5/10/2004 1:10:08 PM
Seminar Evaluation Questionnaire.mdd .mdd 5/11/2004 4:11:58 PM
Service Representative Evaluation Questionnaire.mdd .mdd 5/11/2004 4:12:56 PM
Store Evaluation Questionnaire.mdd .mdd 4/19/2004 9:31:46 PM
Tourist Attraction Questionnaire.mdd .mdd 5/24/2004 11:56:06 AM
Training Evaluation Questionnaire.mdd .mdd 6/2/2004 11:26:42 AM
University Student Satisfaction Questionnaire.mdd .mdd 4/28/2004 1:33:00 PM

- In the Filename box, type a name for the new file.
- Click Save As.

Creating and Installing Shared Templates

Build has a central storage area for templates that are available for general use with all questionnaires. When you are designing questionnaires, you can add templates to the central storage area by using the Upload button on the Select dialog box that is displayed when you select a presentation template for a question.

For simple templates this is all that is required. However, if the template refers to other templates (for example, it names a grid template), or uses a stylesheet, or includes images, you will also need to do the following:

- Within the template, specify filenames as URLs or using a special notation that allows the interviewing program to access them using the image cache. For more information, see the topic Referring to External Files in a Shared Template File on p. 76.
- Create a separate folder in the central storage area for all files referenced in the template file. For more information, see the topic The Shared and Roles Templates Folders on p. 77.

If you add a questionnaire file that uses a template to the library, you will need to create a separate folder within the library to store the template and any files that the template uses, and then copy those files into that folder manually. This applies to both questionnaire-specific and shared templates. For more information, see the topic Copying Questionnaires that use Templates to the Library on p. 77.

Referring to External Files in a Shared Template File

When you want to refer to a different template from within the current template (typically, when you want to refer to a grid template) you can refer to that template using just its filename. So, for example:

```
<mrGridFormat1="DefaultGridTemplate.xml">
```

names a grid template associated with the current template.

You cannot refer to stylesheets or image files using simple filenames. Instead you should do one of the following:

- Enter the full URL for the file and then make sure that you install the file in the location you have specified.
- Precede the filename with */%image cache url%/*; for example, *<link rel="stylesheet" type="text/css" href="/%image cache url%/Summer.css">*

Build will replace */%image cache url%/* with the URL of the image cache so that the interviewing program will be able to load the file from the image cache.

The Shared and Roles Templates Folders

The shared templates folder is called *FMRoot\Shared\Templates*. Within it, the *Data Collection* subfolder contains templates for IBM® SPSS® Data Collection questionnaires written in the mrScriptBasic language. In this subfolder you will find *.htm* files and a number of hidden subfolders whose names are the same as the *.htm* files, but with a _Files extension. For example, there is a *DefaultTemplate.htm* file and a hidden *DefaultTemplate.htm_Files subfolder*. *DefaultTemplate.htm* is the default presentation template and *DefaultTemplate.htm_Files* contains the files that the default template uses (in this case, the default grid template, *DefaultGridTemplate.xml*).

When you create a shared template that uses other templates, stylesheets, or images, you will need to create the *.htm_Files* folder in the Templates folder and copy all the files that the template uses into that folder.

When a questionnaire designer uses a shared template, Build looks for an associated *.htm_Files* folder for that template and copies the contents of that folder into the project folder with the chosen template file.

Build also recognizes templates that are available only to users belonging to a particular role. These templates are stored in *FMRoot\Roles\RoleName\Templates* (for example, FMRoot\Roles\SWGroup1\Templates for templates available only to members of the SWGroup1 role). These Templates folders are the same as the shared Templates folder in all respects.

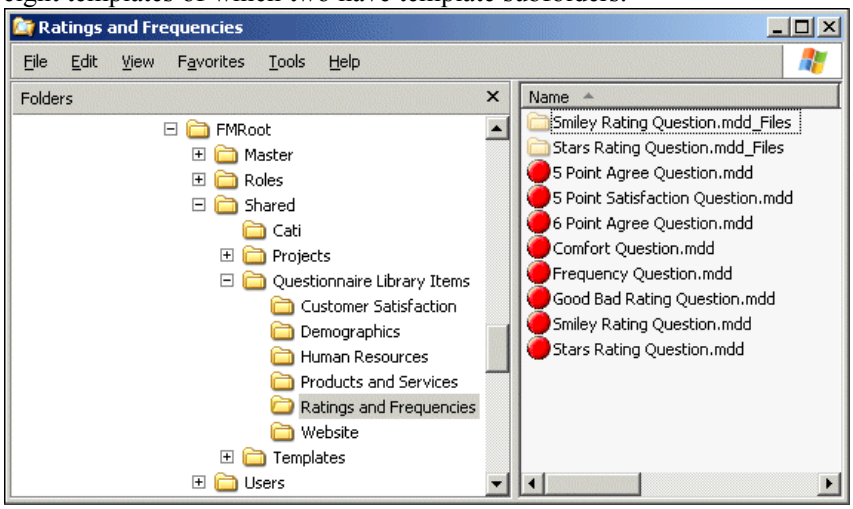
Copying Questionnaires that use Templates to the Library

If you copy a questionnaire to the library and that questionnaire uses templates, you must also copy the templates and any files that are used by the templates into a subfolder within the library. (Later versions of Build will do this for you.) The name and location of the subfolder depend on the name and location of the questionnaire in the library.

The subfolder for templates used by a questionnaire must exist in the library at the same level as the questionnaire file itself. For example, if you copy the questionnaire into the Human Resources library folder you must create the template subfolder in the Human Resources subfolder too.

The name of the template subfolder must be the same as that of the questionnaire file, but with a _Files extension. For example, if your questionnaire is called EmpSat.mdd, you must name the template subfolder EmpSat.htm_Files. It is a good idea to create this as a hidden folder so that it does not appear in the library structure that users see in Build.

For an example of this structure, use Windows Explorer to browse to the Ratings and Frequencies folder in *FMRoot\Shared\Questionnaire Library Items* in the IBM® SPSS® Data Collection Interviewer Server installation folder. As the illustration shows, the folder contains eight templates of which two have template subfolders.



Each template subfolder contains a set of *.gif* image files that are used to represent points in a standard 5-point rating scale.

Participant Rules

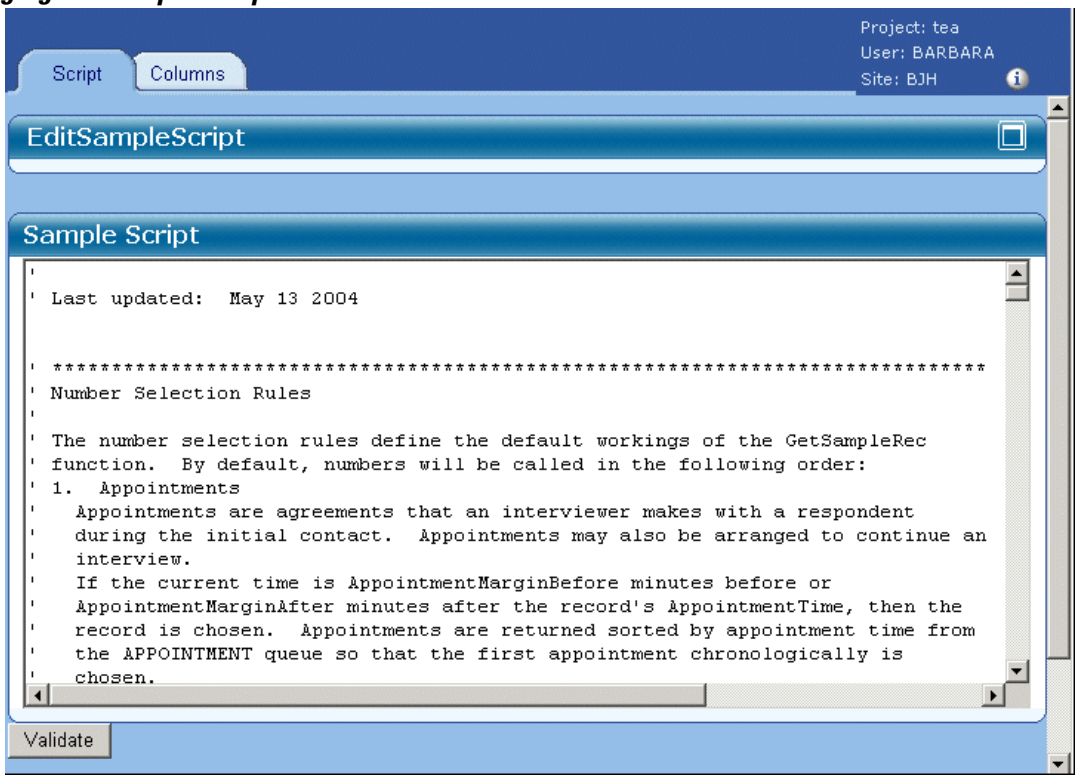
Participant Rules is displayed in the application list whenever you choose a project that uses Sample Management. It allows you to perform the following tasks:

- Change or debug a sample script and validate its syntax without having to reactivate the project.
- Convert a column in the participant database into a Sample Field or Authentication Field.
- Run a test interview using the revised script.

Starting Participant Rules

▶ Select the project you want to work on and click Participant Rules.

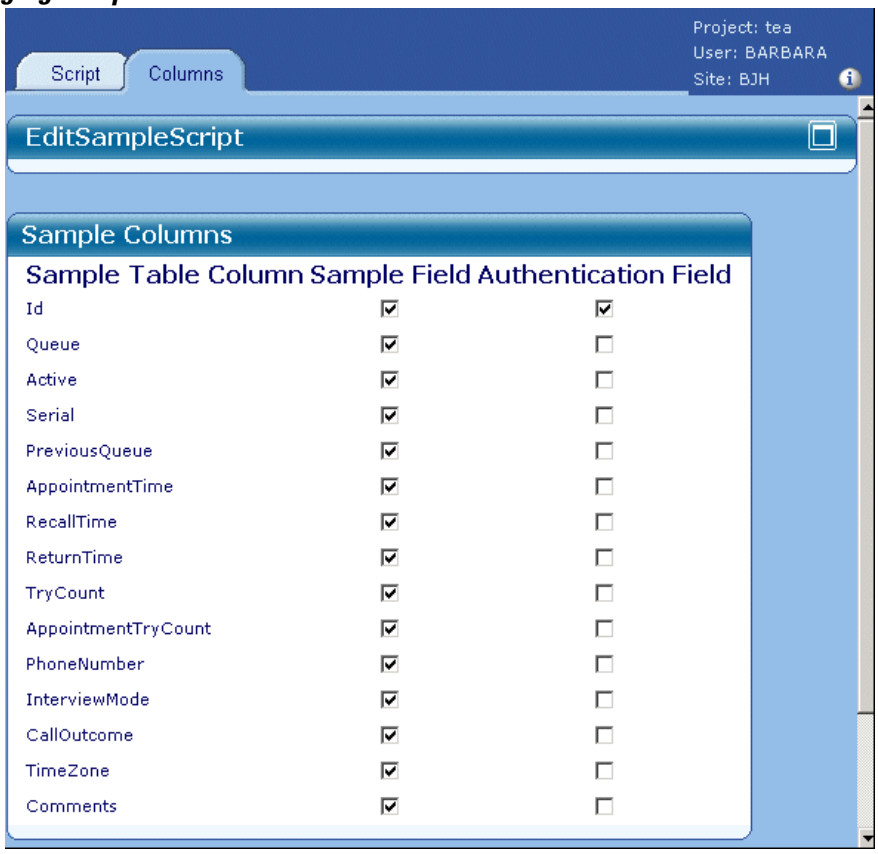
Changing the Sample Script


Project: tea
User: BARBARA
Site: BJH
Script
Columns
EditSampleScript
Sample Script
'
' Last updated: May 13 2004
' **
' Number Selection Rules
'
' The number selection rules define the default workings of the GetSampleRec
' function. By default, numbers will be called in the following order:
' 1. Appointments
' Appointments are agreements that an interviewer makes with a respondent
' during the initial contact. Appointments may also be arranged to continue an
' interview.
' If the current time is AppointmentMarginBefore minutes before or
' AppointmentMarginAfter minutes after the record's AppointmentTime, then the
' record is chosen. Appointments are returned sorted by appointment time from
' the APPOINTMENT queue so that the first appointment chronologically is
' chosen.
Validate

- On the Script tab, make whatever changes are necessary to the Sample Management script.
- Optionally, click Validate to validate the script. This checks that the script is syntactically correct without you having the save the script first. A message is displayed above the script frame at the end of the validation process.
- To save your changes, choose
  Save

  If there are errors in the script, an explanatory message is issued and the original version of the script is reinstated.

Changing Sample Fields and Authentication Fields



- Select the Columns tab.
- To select new sample fields or to cancel existing sample fields, click the check boxes of those fields in the Sample Field column.
- To select new authentication fields or to cancel existing authentication fields click the check boxes of those fields in the Authentication Field column.

Notes

- All authentication fields must also be flagged as sample fields.
- Queue is not a valid authentication field.

Testing the Script

You can test how the Sample Management script will work by running a test interview. This allows you to check that any authentication of inbound calls works as intended, and that the script correctly handles records returned to it with different outcome codes.

- Choose
  Test

Any unsaved changes are saved before the test interview is started.

Participants

You use the Participants activity to copy participant records from a text file into a table in a Sample (participant) database. You can either use an existing database and/or table or you can create new ones. After you have loaded some records, you can use the Participants activity to view and edit those records.

The Participants activity displays a page that contains six tabs. The first three tabs are used to view, edit, delete, and download records that have already been loaded into the sample table—see Viewing and Editing Participant Records for more information. The next three tabs correspond to the three tasks you need to perform before you can upload records. These are:

- Specify the text file and then choose or define the sample database and table into which the participant records will be loaded. You use the Upload tab for this.
- Map fields from the participant records to required columns in the sample table, or create the required columns with default values. You use the Required Fields tab for this.
- Define new columns that you want to create in the sample table to store other information from the participant records. You use the Additional Fields tab for this.

When you have completed these tasks, you can then Upload Records from the Text File.

Participant File Format

Participants reads text files. The first line of the file must contain the names of the fields in each record in the order in which the data appears in the records; the remaining lines contain the participant records. The standard field delimiter is a semicolon; if you have used a different field delimiter such as a comma or a colon, you must specify this on the Upload tab when you upload the file. Note that you cannot use a non-printing character such as a tab character as a field delimiter.

Here is an example of a participant records file:

```
Id;name;region;password
001;Benjamin Brown;South East;pry6354
002;Veronica Burr;Midlands;qre9510
003;Rebecca Noakes;West;mtev037
```

If your file contains non-English accented characters (such as those with umlauts), or Chinese, Japanese, or other double-byte characters, make sure that you save the file using the Unicode text-encoding option (UTF-8) before uploading. The upload will stop with an error message if a file containing these characters is not a Unicode file.

If you intend to upload any datetime fields from your file, the values must be in one of three formats: `yyyy-mm-dd`, `yyyy-mm-dd hh:mi`, or `yyyy-mm-dd hh:mi:ss`. If you specify only the date, Participants will assume that the time part of the value is 00:00:00.

When you load sample records into a new table, Participants creates the table with columns to match the fields in the sample records. If you load another file into the same table, and that file has extra fields in addition to all those in the original file, the load process will create the new columns in the table for those fields, but will do nothing to the original records in the table. This

means that once you have loaded both files, you will still be able to use the old sample records even though they contain less information than the newer ones.

Warning: Do not store your text file in your user's folder for the IBM® SPSS® Data Collection Interviewer Server project. For security reasons, the upload process will delete the file from that location.

Starting Participants

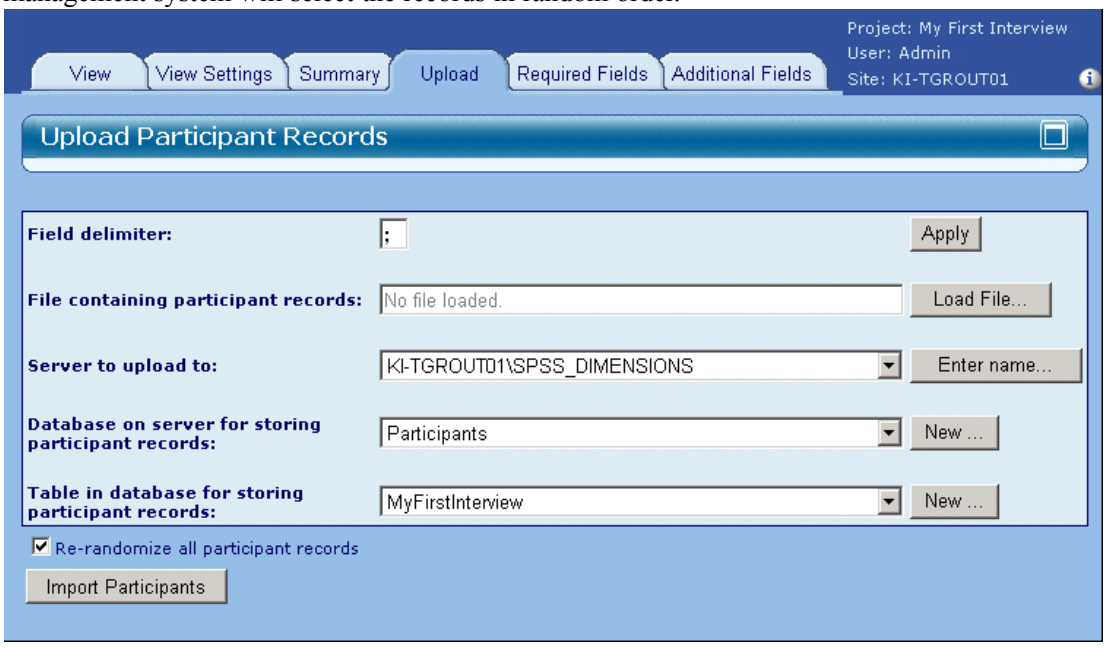
▶ Select the project to which the participant records belong and click Participants.

The Participants activity opens and the Summary tab is displayed. If you want to load participants, select the Upload tab.

Naming the Database Server, Sample Database, and Sample Table

Use the Upload tab to name the text file, the sample database and table in which the sample should be placed, and the name of the server on which the database is located. The IBM® SPSS® Data Collection Interviewer Server installation procedure creates an empty Participants database that you can use if you wish, or you can create a new database for this project or a group of projects. Once you have chosen the database, you can either select an existing table in that database or create a new one.

You can also use the Upload tab to specify that the Participants activity will assign a random number to each participant record, so that for telephone interviewing projects the sample management system will select the records in random order.



To Specify Database Information

▶ Select the Upload tab.

- If the file you want to load uses something other than a semicolon as the field separator, replace the semicolon in the Field delimiter box with the appropriate character and click Apply.

  Note: You cannot use a non-printing character such as a tab character as a field delimiter.

- Click Load File and select the name of the file containing the participant records you want to load.

  Warning: Do not store your text file in your user's folder for the Interviewer Server project. When you load your file, Participants uses that location to save a temporary copy of your file, with the same name as your file. For security reasons, Participants later deletes the temporary copy.

- In "Server to upload to" select the server that contains the database of participant records or on which you want to create a new database. The selection list shows the names of servers that are accessible from your current server.

  If the server's name does not appear in the drop-down list, click Enter name and enter the name of the server when prompted to do so.

- In "Database on server for storing participant records", select the name of the database you want to use. Participants defaults to using the same database as you used before, which is useful if you always load records into the same database. If you want to create a new database, click New and enter the database name when prompted to do so. However, you can create a new database only if you have been assigned the Participants activity feature "Can create databases"—see Controlling Access to Data and Features for more information.

  Note: If you created a new database manually before opening Participants, you must give the Interviewer Server Anonymous User permission to access that database otherwise the Participants activity will be unable to load records into it.

- In "Table in database for storing participant records", select the name of the table you want to load the records into. Participants defaults to using a table with the same name as the project and will create it if it does not exist. If you want to use or create a table with a different name, click New and enter the table name when prompted to do so.

  Note: If possible, create a separate table for each project. You can create a sample table that is shared by a number of projects, but you then run the risk of overwriting a project's data due to the interview serial number field being populated on one project and then being used in the second project. For example, if a record is used on project A and generates an interview with serial number 100, the number 100 is written back into the Serial field. If the record is then used on Project B, the interviewing program will read the serial number for the new interview from the sample record and will create an interview with that serial number. If there is already an interview with that serial number, its data will be overwritten. To avoid this, you should always prepopulate the Serial field in shared sample tables.

- To specify that the *SortId* column on the sample table should be automatically populated with random values, select the Re-randomize all participant records checkbox. This will allow the sample management system to select the records in random order. Alternatively, if your participants text file includes your own values for *SortId*, or you want the participant records to be selected in *ID* column order, or you will not be using this project for telephone interviewing, clear this checkbox. For more information, see the entry for SortId in Mapping Fields to Required Columns in the Sample Table.

You must complete all fields on this tab before selecting another tab. If you leave a field incomplete, an error will occur when you try to use the other tabs.

Mapping Fields to Required Columns in the Sample Table

The Sample Management system requires each sample table to have at least the following five columns. If you use the Participants activity to upload your file to a new table, these columns will be created automatically.

Column	Description
Id	Contains a number or code that uniquely identifies each participant record. You must supply this information in your text file. If your text file contains a field called "id" (in any combination of uppercase or lowercase letters), Participants automatically maps that field to this column, otherwise Participants maps the first field in the text file to this column. You can change the mapping if the field that contains the participant's id is not the first field in the text file—see "To Change the Mapping of a Field to a Required Column" below. If you are loading participant records into an existing table, this column must be the Primary Key for the table. If you have specified that Participants must create the sample table, it will automatically set this column to be the primary key. If you are loading participant records into an existing table in a case-sensitive SQL database, the name of the column on that table must be exactly as shown, this is, an uppercase I followed by a lowercase d.
Active	The sample management system sets the value of this column to 1 while it is running, and 0 at all other times.
Queue	This column shows the queue in which the record is currently held. Participants sets the value of this column to FRESH when loading a participant record. The sample management system then updates the value as appropriate. When replicate identifiers are defined in the queue field for specific records, those records can then be used to create sample/participant record subsets. Refer to the "Queues" topic in the *IBM® SPSS® Data Collection Developer Library* for more information.

Column	Description
Serial	Participants sets the value of this column to 0 when loading a participant record. The sample management system then sets the value of this column to the serial number of the interview associated with the participant record.
Test	This column is used by the Phone activity to filter the participant records that appears in phone reports. If the value of this column is 0, the Phone activity will treat the record as real data (or "live" data). If the value of this column is 1, the Phone activity will treat the record as test data. If your text file does not contain a field with this information, Participants will set the value of this column to Null, and the Phone activity will then treat the record as if it is both real and test data. If you are loading participant records into an existing table, your table must include this column, even if your project is not a telephone-interviewing project.

Sample tables for telephone interviewing projects must also include the following columns. If they do not exist, they will be added automatically if you select the "Use sample for phone interviewing" option described later in this topic, or if you activate the project using the "With CATI" option on the Sample Management tab of the Launch activity.

Column	Description
ActivityStartTime	The StartTime of the latest record in history table for a specific sample.
AppointmentTime	The time at which the respondent asked to be called. (Times are shown in UTC format. The project's Sample Management script takes into account any time differences between interviewers and participants when it selects records for calling.)
AppointmentTryCount	The number of calls made to this record after an appointment was set.
Audit	A list of the changes that interviewers have made to this record.
CallOutcome	The call outcome code for the previous call to this record.
CallRecordingsCount	The number of call recordings for this record. Call recording is an option when a telephone interviewing project uses an autodialer.
Comments	Additional information about the participant.
ConnectCount	The number of connect returns for the record.
DayPart	Ensure that records are called at specific times of the day in order to increase the chance of success in reaching participants.
ExpirationTime	Defines the participant record expiration date and time. For example, a project may dictate that participant records can only be called within a specific date range. Expired records are not available for dialing (except for retrieving appointments).

Column	Description
InternalDialerFlags	Freeform string that can be used to store whatever your dialer requires. For example, this field could contain Name=Value pairs that you need to store after calling the record. This could be useful when the record is dialed again.
InterviewMode	How the record can be used: set to *Web* for an inbound self-completion interview or *Web CATI* for outbound telephone interviewing.
NoAnswerCount	The number of no answer returns for the record.
PhoneNumber	The participant's phone number. If you are uploading records for a telephone interviewing project and you want interviewers to be able to dial phone numbers automatically using a modem, phone numbers must be formatted as follows: +Country/RegionCode (Area/CityCode) SubscriberNumber For example, 44 12 3456 7890 for a subscriber in the United Kingdom. The modem option might not work if the phone number is in any other format. If your telephone interviewing project will use an autodialer, a phone number must contain only the digits 0 to 9, * and # (optionally preceded by a plus (+) to present the international access code). In addition, the phone number can contain the visual separators SPACE, (,), . and -. Visual separators are not allowed before the first digit.
PreviousInterviewerId	The interviewer who last retrieved the record. Used by the Sample Management script to return an appointment to the interviewer who arranged it.
PreviousQueue	The name of the queue in which the record was previously held.
RecallTime	The time in UTC that was set as the callback time for appointments that are set automatically by the Sample Management script.
ReturnTime	The time at which the record was returned to Sample Management.
Screener	Allows you to identify which respondents are the suitable candidates for the current survey. Screener questions are designed to filter respondents. If a respondent answers do not meet the Screener criteria, the respondent is not allowed to continue the survey, and the Screener field is recorded as **Failed**. If respondent answers meet the Screener criteria, they are allowed to continue the survey, and the Screener field is recorded as **Passed**.

Column	Description
SortId	This integer column can be used to define the order in which participant records are selected from the FRESH queue by the sample management system. If you are using the telephone-interviewing sample management script that is supplied with IBM® SPSS® Data Collection Interviewer Server, the script will select the record with the lowest value in this column. You can populate this column in one of two ways: by including your own values for SortId in your text file, or by specifying that this column should be populated with random values automatically when your file is uploaded. To specify that you want random values, select the "Re-randomize all participant records" option on the Upload tab. Note that this will also result in new values being assigned to any existing records in the sample table. If you choose not to populate this column, Participants sets its value to Null when loading a participant record. The telephone-interviewing sample management script that is supplied with Interviewer Server will then select the record from the FRESH queue that has the lowest value in the Id column.
TimeZone	The participant's timezone.
TrunkGroup	If sample records are used in telephone interviewing projects, you can use the TrunkGroup field to specify which trunk group of the dialer will be used for dialing the sample record. If you want the dialer to automatically select the trunk group, the field should be set to NULL or empty.
TryCount	The number of calls made to this record.
UserId	The UserId of latest record in the history table for a specific sample.

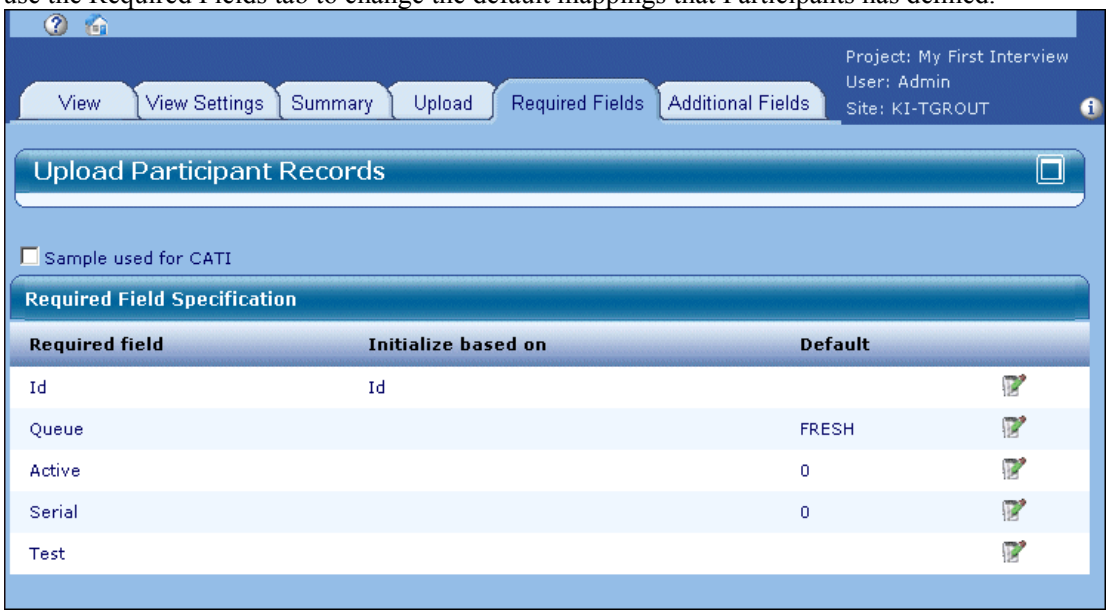
Your participants text file does not need to contain information for all the required columns, as many of the columns are used only internally by the sample management system and will only contain information once a participant has been called. As a minimum, you must supply a value in your text file for the Id column. For telephone interviewing projects, you should provide a value for the PhoneNumber column, and if you have participants in more than one time zone you might want to provide a value for the TimeZone column.

For more detailed information about the sample table, use the search function in the Data Collection Developer Library documentation to search for the text "Sample Table" and in the search results open the topic with that title.

Mapping Fields in the Text File to Required Columns in the Sample Table

If a field in your participants text file has the same name as a required column, the Participants activity automatically maps the field to that column. The upload process will subsequently copy the value of that field to that column.

However, your text file might contain information that should be uploaded to a required column, but the field name in the text file is different from the required-column name. In this situation, you use the Required Fields tab to change the default mappings that Participants has defined.



For example, if your text file contains phone numbers in a field called TelNo, you can use the Required Fields tab to map the TelNo field to the PhoneNumber column.

If your participants text file contains other (that is, non-required) fields, the Participant activity will automatically map those to additional columns in the sample table. To change the mapping for those fields, use the Additional Fields tab.

To Change the Mapping of a Field to a Required Column

- Select the Required Fields tab.
- If you are uploading records for a telephone interviewing project, click Use sample for phone interviewing. This refreshes the table to show the additional columns required for telephone interviewing.
- Click the Edit symbol (the pencil) on the right of the field whose mapping you want to change. This changes the "Initialize based on" column to a drop-down list of field names present in the text file.
- In "Initialize based on", choose the field that should map to this required column. Alternatively, choose new to specify that no field should be mapped to this column.

  Note: If a column doesn't have a field mapped to it, or if it does have a field mapped to it but the text-file record contains no value for that field, the upload process will insert the Default value in that column.
- Click the Update symbol (the blue check mark) to save the change, or the Cancel symbol (the red cross) to cancel it.

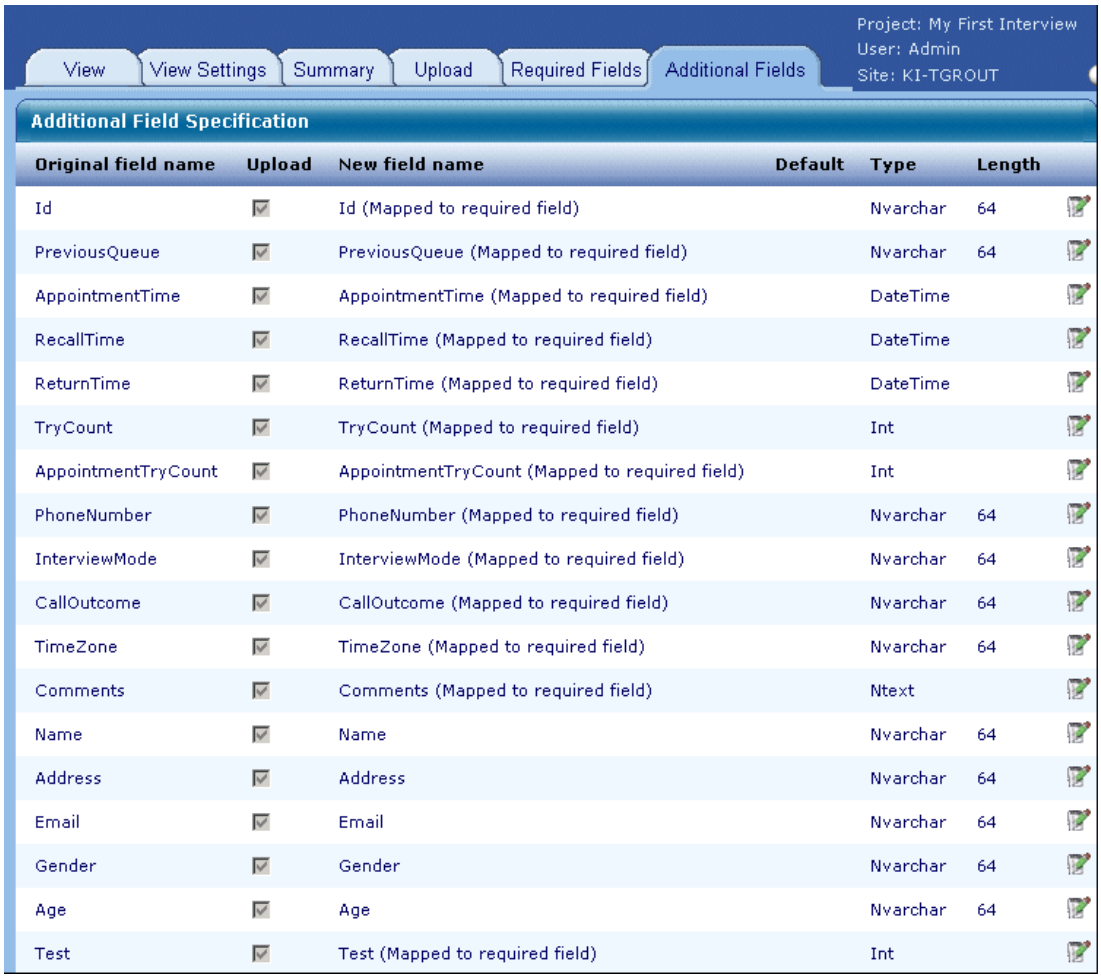
Adding Other Information to the Sample Table

You use the Additional Fields tab to view or change the default mappings for fields in your participants text file that do *not* correspond to the required columns in the sample table. Participants automatically maps these fields to additional columns, and sets the column name to be the same as the field name. The upload process will subsequently copy the value of that field to that column.

For example, for telephone interviewing projects, you might want to upload the participant's name and address. In addition, for projects whose participants speak different languages, you might want to upload the participant's language so that you can use interviewer qualifications to match interviewers to participants. For more information about interviewer qualifications, search the *IBM® SPSS® Data Collection Interviewer Server Administration User's Guide* for the topic "Adding Properties to User Property Groups".

The Additional Fields tab lists all fields in the file you are uploading. However, you can change the settings only for those fields that are not already mapped to required columns.

Note: If you want to use the "Call Outcome by Segment" and "Calls by Segment" reports in the Phone activity to display data about segments (that is, groups or categories of your choice), you must upload segment information from your text file into a column called "Segment" in the sample table. For more information about segments, see About Segments.



Item	Description
Original field name	The name of a field in the participants text file.
Upload	Whether to upload the field into a column in the sample table.
New field name	The name for the corresponding column in the sample table. If the field has already been mapped to a required column, this is noted here and you are not able to change the field's settings on this tab.
Default	The default value for this column if the record in the text file does not contain a corresponding value for this column.
Type	The data type for this column. Based on the data in the text file, Participants suggests the best data type to use.
Length	The maximum size of this column. This can be set for some data types only.

To Change the Mapping of a Field to an Additional Column

- Select the Additional Fields tab.
- Click the Edit symbol (the pencil) on the right of the field whose mapping you want to change. Choose only a field that has *not* been mapped to a required column.

  Note: If you want to change the mapping for a field that has been mapped to a required column, use the Required Fields tab.
- If you do not want Participants to load this field into the sample table, clear the Upload check box.
- If you do not want Participants to make the column name in the sample table the same as the field name in the text file, change the value of "New column name".

  Note: Column names in the sample table must comply with the rules for SQL column names. In general, a column name must start with a letter or an underscore and be followed by any combination of letters, numbers, underscores, and the @, $, or # characters. For more information, use the search function in the IBM® SPSS® Data Collection Developer Library documentation to search for the text "Rules for Regular Identifiers" and in the search results open the topic with that title.
- If you do not want Participants to set the value of this column to Null when the record in the text file does not contain a corresponding value for this column, enter the new default value in "Default".

  Note: The default value must be a valid for the data type of the column as specified in "Type".
- In Type, choose the data type that matches the type of data the field contains.

  Note: This column shows the IBM® SPSS® Data Collection Data Model data types. When Participants creates the columns in the database, it converts these data types into the data types used by your database application. Most database applications have a wider range of data types than the Data Model, so Participants chooses the database data type that best matches the data that it finds in the text field. For example, the Data Model classifies all whole numbers (integers) as Long, while an SQL database will classify them as either int or smallint depending on the length of the number. If it is important that the columns are created with particular data types in the database, you can examine and change the columns' definitions using your database application's tools once the participant records have been loaded.
- In Length, enter the maximum size of this column in the sample table.
- Click the Update symbol (the blue check mark) to save the change, or the Cancel symbol (the red cross) to cancel it.

Replicates

Replicates are a mechanism for making sets of participant records available for dialing. The sets of participant records can be grouped based on a particular meaning (specific day of the week for example) or may be arbitrary groups representing a portion of the available participant records.

The record sets are defined by applying replicate identifiers to each participants record's **Queue** field. These identifiers allow you to determine which replicates are being dialed.

Replicates are simply different queues, for example you could specifyQueue='REPLICATE1' for the first replicate (or Queue='MIDWEST1' for the region specific replicate). Uploading participant records that contain replicate identifiers does not make them immediately available for dialing. You must first release the replicates by updating the participant table. For example:

```
UPDATE ParticipantTable SET Queue='FRESH' WHERE Queue='REPLICATE1'
```

This can be performed in the IBM® SPSS® Data Collection Interviewer Server's Participants activity. You can report on **Queue** by any other field. For example, a report of **Queue** by Region would show how many records are available in each replicate (as well as all the other queues) for each Region.

Force Preview Dial

National or state regulations may require that certain numbers cannot be auto-dialed (cell phone numbers for example). The Force Preview Dial feature forces the interviewer to manually select the dial button for specific participant records, thus avoiding silent calls.

Configuring a participant records sample

The following instructions explain the process of configuring participant records for Force Preview Dial:

- Edit the participant records file to include the RequiresManualDial field and specify a value of 1 for each record that requires manual dialing. For example:

```
Id;name;region;password;RequiresManualDial
001;Benjamin Brown;South East;pry6354;1
002;Veronica Burr;Midlands;qre9510;1
003;Rebecca Noakes;West;mtev037;1
```

For more information, see the topic Participant File Format on p. 81.

When the participant records file is uploaded via the IBM® SPSS® Data Collection Interviewer Server's Participant activity, all records that have a value of 1 for the RequiresManualDial field will require the interviewer to manually initiate dialing.

Uploading Records from the Text File

▶ On the Upload tab, click Import Participants.

A progress box reports the number of records uploaded.

▶ When all records have been processed, click OK to close the progress box.

Notes

- The Participants activity uploads all records in a text file in one go. It is not possible to load only part of a file.

- If the text file you are uploading contains a record with the same Id as a record that is already in the sample table, the Participants activity rejects the record and continues with the next record in the text file. At the end of the upload, Participants displays a list of rejected records.
- If the upload process fails with the message "CREATE DATABASE permission denied in database 'master'", the problem might be that the Anonymous IIS User account does not have permission to create databases. Contact your IBM® SPSS® Data Collection Interviewer Server administrator for assistance.
- Only values from newly added fields are added to existing records when uploading samples into an existing database. Existing database values are not updated, even when they differ from values in the newly uploaded file.

Viewing and Editing Participant Records

You can view participant records that have already been loaded into the sample table. The Participants activity has two options for this:

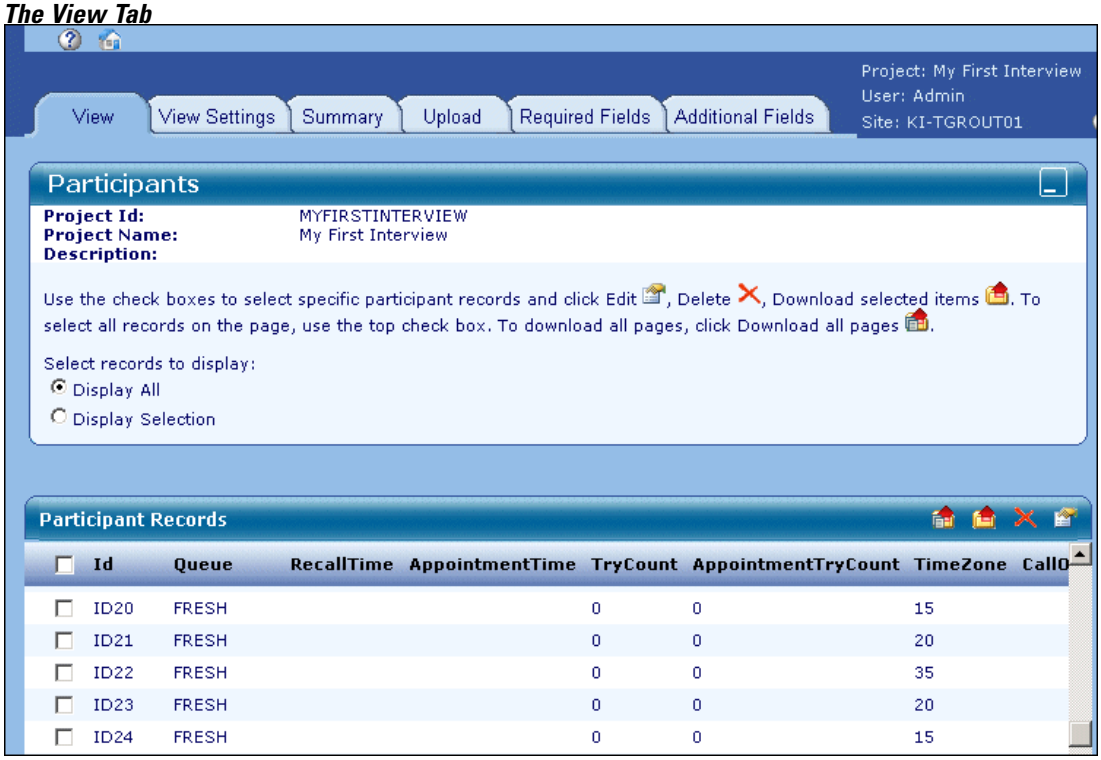
- The **View** tab displays the records in detail. You can choose how many records you want listed at once, which columns you want to appear, and in which order the columns will appear. You can also use the View tab to display a selection of records, to edit records, to perform a bulk update, to delete records, and to download records to a text file.
- The **Summary** tab displays the total number of records in each queue. If you click the View Queue icon on the right of one of the queues, the records in that queue are displayed in the View tab.

The remainder of this topic describes the following subjects:

- The View tab.
- Navigating the View tab.
- Using the **View Settings** tab to customize the View tab.
- Changing the default list of fields displayed on the View tab.

Note: If you are using Microsoft Internet Explorer 8 or above to access the Participants activity and your participant records contain Chinese, Japanese, or Korean characters (that is, double-byte characters), the characters will be displayed correctly only if you have installed files for East Asian languages on your computer. You can normally do this from Regional and Language Options (or Regional Options) in Windows Control Panel.

The View Tab


Project: My First Interview
User: Admin
Site: KI-TGROUT01
View
View Settings
Summary
Upload
Required Fields
Additional Fields
Participants
Project Id: MYFIRSTINTERVIEW
Project Name: My First Interview
Description:
Use the check boxes to select specific participant records and click Edit, Delete, Download selected items. To select all records on the page, use the top check box. To download all pages, click Download all pages.
Select records to display:
Display All
Display Selection
Participant Records
Id Queue RecallTime AppointmentTime TryCount AppointmentTryCount TimeZone CallO
ID20 FRESH 0 0 15
ID21 FRESH 0 0 20
ID22 FRESH 0 0 35
ID23 FRESH 0 0 20
ID24 FRESH 0 0 15

The View tab consists of the Participants pane and the Participants Records table. The Participants pane contains options for displaying all participant records or a selection of participant records. For more information, see the topic Displaying a Selection of Records on p. 96. The Participants Records table displays the participant records. See "To Customize the View Tab" below for more information about changing the number or order of the columns in the table. Note that datetime columns are always shown in `yyyy-mm-dd hh:mi:ss` format.

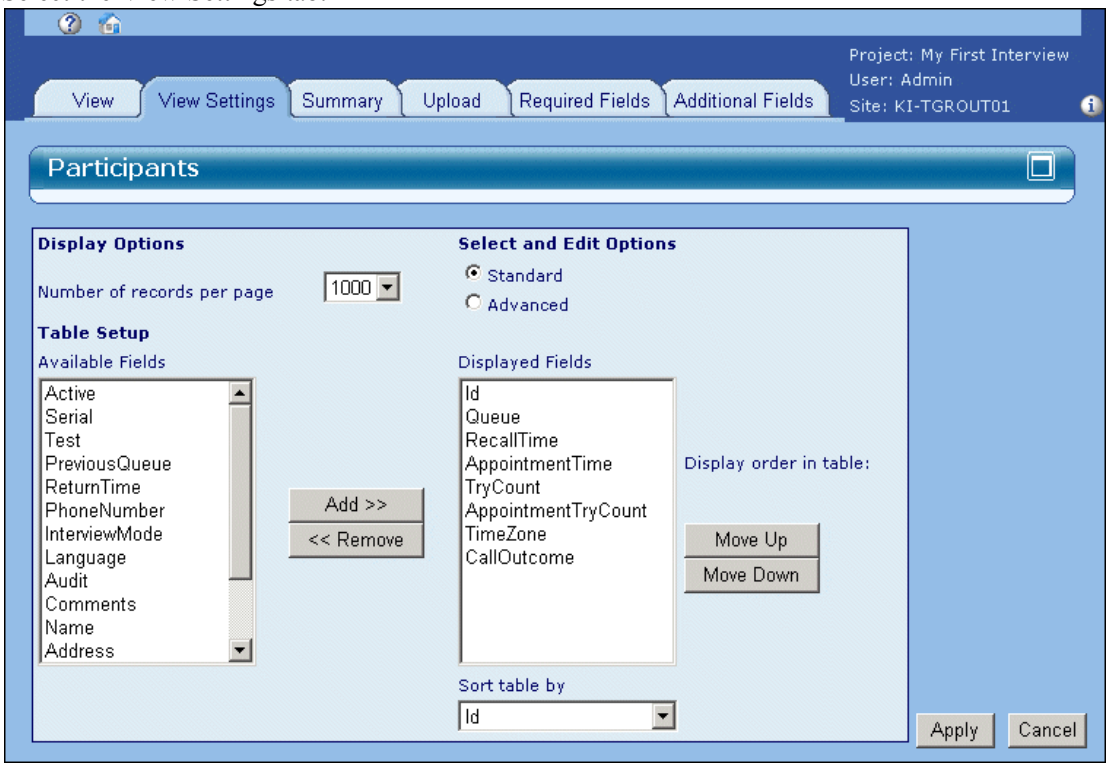
Navigating the View Tab

By default, the View tab displays 50 records on each page. At the lower left of each page, the total number of records in the sample table and the total number of pages are shown. The icons at the bottom of each page can be used to navigate between pages, as shown in the following table:

Icon	Description
◀◀	Display the first page.
◀	Display the previous page.
[1] [2] [3] ...	Display page 1, page 2, page 3, and so on.
▶	Display the next page.
▶▶	Display the last page.

To Customize the View Tab

▶ Select the View Settings tab.



▶ In Display Options, select the number of records that you want to appear in each page on the View tab. You can select from 25 to 1000 records.

Note: The Participants activity can be customized by an administrator to show other values in the Display Options list, for example, to display more than 1000 records. For more information, use the search function in the IBM® SPSS® Data Collection Developer Library documentation to search for the text "Settings for the Participants Activity" and in the search results open the topic with that title.

▶ In "Select and Edit Options", choose the method you want to use for selecting and updating records on the View tab as follows:

- Standard. This option allows you to construct your selection criteria by choosing values from drop-down lists. If you select this option, you can update records on the View tab only by changing their values in a dialog box.
- Advanced. This option allows you to write your selection criteria by typing an expression similar to the WHERE expression in an SQL SELECT statement. If you select this option, you can also update the selected records by typing another expression similar to the SET expression in an SQL UPDATE statement.

Note: You can select the Advanced option only if you have been assigned the Participants activity feature "Can advanced edit participants". For more information, see the topic Controlling Access to Data and Features on p. 107.

- In Table Setup, choose which fields will appear on the View tab as follows:
  - To add a field to those displayed, click on the field name in the Available Fields list and then click Add.
  - To remove a field from those displayed, click on the field name in the Displayed Fields list and then click Remove.

  Tip: In Table Setup, you can select multiple fields by pressing Ctrl or Shift while you click.

  Note that Table Setup shows only those fields that you have access to. For more information, see the topic Controlling Access to Data and Features on p. 107.

- In Table Setup, choose the order of the fields displayed on the View tab as follows.
  - To move a field towards the left of the page, click on the field name in the Displayed Fields list and then click Move Up.
  - To move a field towards the right of the page, click on the field name in the Displayed Fields list and then click Move Down.
- In the "Sort table by" drop-down list, select the field that will determine the order of the records on the View tab.
- When you have completed your changes, click Apply. To undo your changes, click Cancel.
- Select the View tab to see your changes.

Changing the Default List of Fields Displayed on the View Tab

When you create a new project, the Displayed Fields list in the View Settings tab is populated with a default list of fields provided by IBM® SPSS® Data Collection Interviewer Server. To change the default list that Interviewer Server provides, you need to use DPM (Distributed Property Management) Explorer as follows:

- In Windows Explorer, run *DPMExplorer.exe*, which by default is located in the *[INSTALL_FOLDER]\IBM\SPSS\DataCollection\6\DDL\Code\Tools\VB.NET\DPM Explorer.Net* folder.
- In the left pane, expand the top-level node (the site name) and then click the Properties node.
- In the upper-right pane, click the ParticipantsDefaultDisplay property.
- In the lower-right pane, change the list of field names as required. Make sure that you separate field names with semicolons, and do not add any spaces.
- Click the Apply button, which is in the lower-right corner.

Displaying a Selection of Records

By default, the View tab of the Participants activity displays all of the participant records in the sample table. Because a sample table might contain thousands of records, you can choose to display only a selection of records so that you can more easily find the records that you want to view.

You specify the records that you want to display by defining selection criteria. For example, the criteria might be to select a single record with a specific Id, or to select all the records for which an interview has been successfully completed.

The method that you use to specify selection criteria depends on whether the Standard or Advanced option under "Select and Edit Options" has been selected on the View Settings tab. The rest of this topic assumes that the Standard option has been selected. If the Advanced option has been selected, see Performing a Bulk Update.

Note: Depending on the sample database that you are using, text searches might be case sensitive. If so, you must type text values so that they match the case of the data in the sample table. For example, queue names such as COMPLETED must always be typed in upper case.

The remainder of this topic describes the following procedures:

- **To Display a Selection of Records**
- **To Display Records that fall within a Range of Values**
- **To Display Records that have one of Several Values**
- **To Display Records that Contain a Word or Phrase**
- **To Display Records that Contain a Date**
- **To Display Records that Contain an Empty Field**

To Display a Selection of Records

▶ On the View tab, make sure that the Participants pane is maximized so that you can see the Display All and Display Selection options.

▶ Select the Display Selection option.

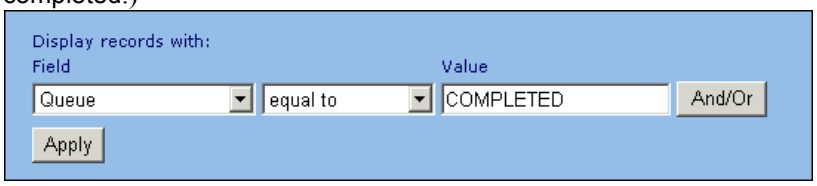
A group of drop-down lists, text boxes, and buttons appears. You use these to specify the selection criteria that will determine which records are displayed. For example, your criteria might select only records that are in the COMPLETED queue.

▶ In the Field drop-down list, select the field that you want to use in your selection criteria, for example, Queue.

Note that the Field drop-down list includes only those fields that you have access to. For more information, see the topic Controlling Access to Data and Features on p. 107.

▶ In the drop-down list to the right of Field, select the comparison that you want to use in your selection criteria, for example, equal to.

▶ In the Value text box, type the value that you want to use in your selection criteria, for example, COMPLETED. (However, if your sample database is not case sensitive, you could instead type completed.)



▶ Click Apply.

The list of participant records will now include only those records that match your selection criteria. If there are more records than will fit on one page, use the icons at the bottom of the page to navigate between pages.

Notes

- A quicker method for displaying all the records in one queue is to click on the Summary tab and then click the View Queue icon on the right of the queue.
- To return to displaying all participant records, select the Display All option in the Participants pane.

To Display Records that fall within a Range of Values

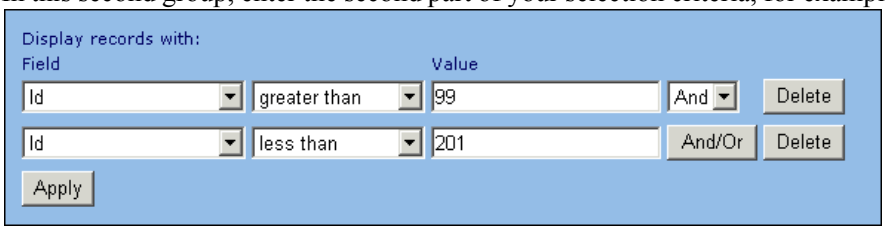
You might want to display only records that have a value that falls between two values, for example, records that have an Id between 100 and 200.

▶ Enter the first part of your selection criteria, for example, Id, greater than, 99.

▶ Click the And/Or button.

A second group of drop-down lists, text boxes, and buttons appears under the first group.

▶ In this second group, enter the second part of your selection criteria, for example, Id, less than, 201.



▶ Click Apply to display the records that match your selection criteria.

Note: To remove a line from your selection criteria, click Delete on the right of the line that you want to remove.

To Display Records that have one of Several Values

You might want to display only records whose value is equal to any one of several values, for example, records that are in the FRESH queue, or the ACTIVE queue, or the FAILED queue.

▶ Enter the first part of your selection criteria, for example, Queue, equal to, FRESH.

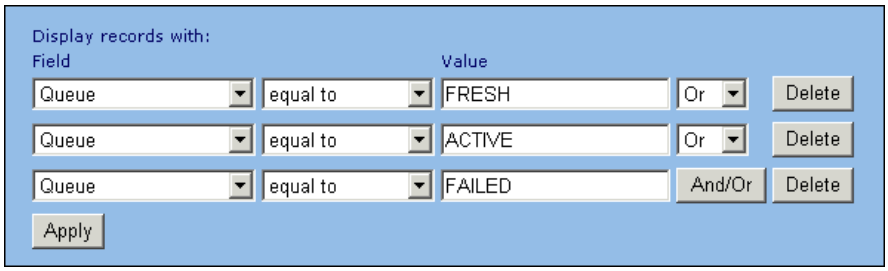
▶ Click the And/Or button.

▶ In the And/Or drop-down list, select Or.

▶ Enter the second part of your selection criteria, for example, Queue, equal to, ACTIVE.

▶ Click the And/Or button and select Or from the drop-down list.

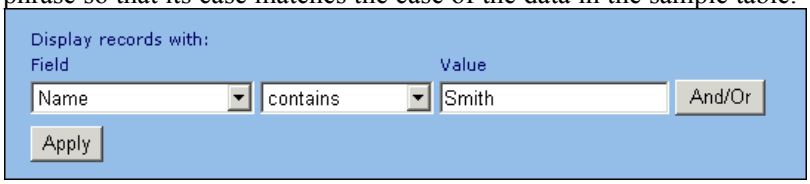
▶ Enter the third part of your selection criteria, for example, Queue, equal to, FAILED.



► Click Apply to display the records that match your selection criteria.

To Display Records that Contain a Word or Phrase

To display only records that contain a word or a phrase, use the contains comparison in your selection criteria. For example, if your participant records include a Name field, you can display all the participants whose surname is Smith by specifying Name, contains, Smith as your selection criteria. Remember that if your sample database is case sensitive, you must type the word or phrase so that its case matches the case of the data in the sample table.



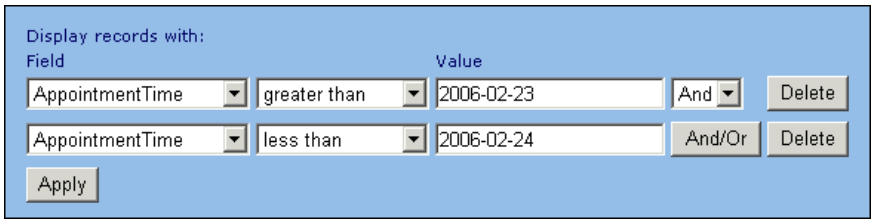
Note: The contains, does not contain, starts with, does not start with, ends with, and does not end with comparisons use the Transact-SQL `LIKE` operator, which means that you can use wildcard characters in your search value. Some examples of the use of wildcard characters are:

- %, which means any string of zero or more characters.
- _ (an underscore), which means any single character.
- [abc], which means any of the characters a, b, or c.
- [w-z], which means any characters in the range w to z.
- [^de], which means any character except d or e.

To search for an underscore, specify [_] (an underscore enclosed in brackets). To search for a percent, specify [%].

To Display Records that Contain a Date

If your selection criteria includes a datetime field, you must enter the value in one of three formats: `yyyy-mm-dd`, `yyyy-mm-dd:hh:mi`, or `yyyy-mm-dd hh:mi:ss`. If you specify only the date, a time of 00:00:00 is assumed. Therefore, to display records that contain a specific date, your selection criteria must be specified as a range. For example, if your participant records include an AppointmentTime field, you can display all the participants that have an appointment on 23 February 2006 by specifying your selection criteria as AppointmentTime, greater than, 2006-02-23, And, AppointmentTime, less than, 2006-02-24.



To Display Records that Contain an Empty Field

To display only records that contain an empty field, select the field name, then select the is empty comparison, and then click Apply. Note that you do not need to enter a value when using the is empty or is not empty comparisons.

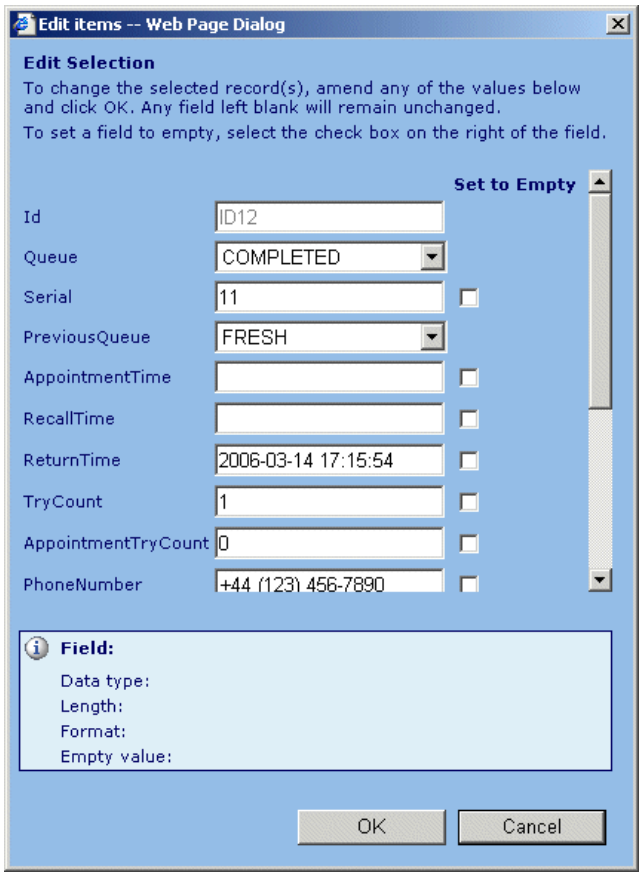
Editing Records

The View tab of the Participants activity allows you to change the value of any field in a participant record, with the exception of the Id field. In addition to editing individual records, you can also edit multiple records simultaneously, in which case any changes that you make are applied to all the records that you chose to edit.

To Edit a Record

- On the View tab, select the check box on the left of the record that you want to edit.
- Click the Edit icon in the top-right corner of the list of records as shown below:

The Edit dialog opens.



Note: When you click on a field, the information pane at the bottom of the Edit dialog tells you whether the corresponding column in the sample table is a text column, a numeric column, or a date column. The information pane also shows the minimum and maximum values for numeric columns, and the maximum length for text columns.

- Change any of the values to new values.

  If you change a date field, the new value must be in one of three formats: `yyyy-mm-dd`, `yyyy-mm-dd:hh:mi`, or `yyyy-mm-dd hh:mi:ss`. If you specify only the date, a time of 00:00:00 is assumed.

  If you change the PhoneNumber field and your project uses modems or an autodialer to dial participants' phone numbers, make sure that the new phone number is in the correct format and doesn't contain any invalid characters. For more information, see the topic Mapping Fields to Required Columns in the Sample Table on p. 84.

- If a field contains a value, but you want the field to be empty, select the check box to the right of the field, under the heading Set to Empty.

  Note: The information pane at the bottom of the Edit dialog tells you what value will be used if you select Set to Empty.

- When you have finished making your changes, click OK. To undo your changes, click Cancel.

  The Edit dialog closes and after a brief pause, another dialog box opens to confirm that your update was successful.

- Click Close.

  The list of participant records refreshes to show your updates.

To Edit Multiple Records

Note that the records that you want to edit must appear on the same page. You cannot simultaneously edit records on more than one page.

- On the View tab, select the check box on the left of every record that you want to edit. Alternatively, if you want to edit all the records on the page, select the check box on the left of the field names.

- Click the Edit icon in the top-right corner of the list of records as shown below:

  The Edit dialog opens. Note that values are shown in the dialog only when the value is identical for all the records that you selected. If a value is not shown, it might indicate that the records have different values or that the field is empty in all the records that you selected.

- Make your changes and click OK.

  The Edit dialog closes and after a brief pause, another dialog box opens to confirm the number of records that were updated.

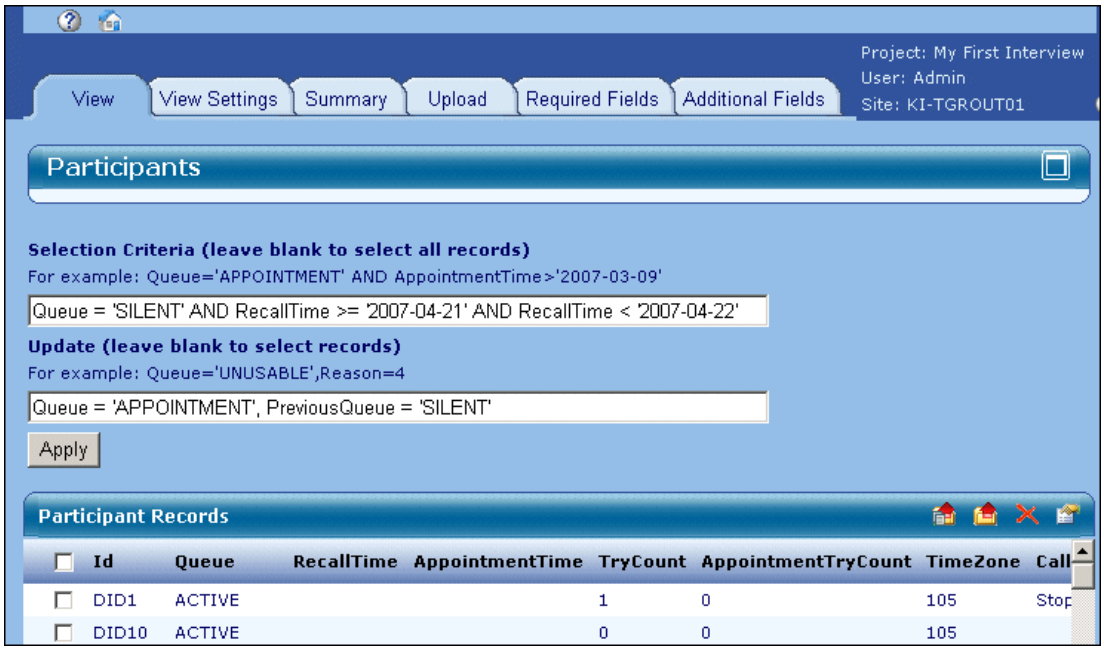
- Click Close.

Performing a Bulk Update

The bulk update feature of the Participants activity makes it easy to update many participant records at once. You specify the records that you want to update and the updates that you want to make by typing two expressions similar to those used in SQL statements. Alternatively, you can just display a selection of records without updating them. To use the bulk update feature, select the Advanced option under "Select and Edit Options" on the View Settings tab.

Warning: Always use the bulk update feature with care, as Participants does not have an undo option.

Note that you cannot use the bulk update feature to delete records (instead, see Deleting Records).



Selecting Records

You specify the records that you want to select for updating or displaying (that is, your selection criteria) by typing an expression of the following form:

column_name comparison_operator value

column_name

Specifies the name of the column on the sample table. You can specify only a column that you have access to. For more information, see the topic Controlling Access to Data and Features on p. 107.

comparison_operator

Must be one of the following operators: = (equals), < (less than), > (greater than), <= (less than or equal to), >= (greater than or equal to), !< (not less than), !> (not greater than), <> (not equal to), or != (not equal to).

You can also specify the Transact-SQL `LIKE` operator, which will allow you to include wildcard characters in your value. Some examples of wildcard characters are:

- %, which means any string of zero or more characters.
- _ (an underscore), which means any single character.
- [abc], which means any of the characters a, b, or c.
- [w-z], which means any characters in the range w to z.
- [^de], which means any character except d or e.

value

Specifies a value with the same data type as the column. If the column is a text or datetime column, enclose the value in single quotation marks. If a text value contains double-byte characters, add the capital letter N before the opening single quotation mark to specify that the value is Unicode. If the column is a datetime column, the value must be in one of three formats: `yyyy-mm-dd`, `yyyy-mm-dd:hh:mi`, or `yyyy-mm-dd hh:mi:ss`. If you specify only the date, a time of 00:00:00 is assumed.

Note: Depending on the sample database that you are using, text searches might be case sensitive. If so, you must type text values so that they match the case of the data in the sample table. For example, queue names such as COMPLETED must always be typed in upper case.

An expression can also be of the following form:

column_name **IS** [**NOT**] **NULL**

Your selection criteria can consist of two or more expressions (or "sub-expressions"), combined by using the `AND`, `OR`, and `NOT` logical operators.

Examples of Selection Criteria

1. To select all records that are in the COMPLETED queue:

```
Queue = 'COMPLETED'
```

2. To select all records that are in the COMPLETED queue and have an Id between 100 and 200:

```
Queue = 'COMPLETED' AND Id >= 100 AND Id <= 200
```

3. To select all records that are in either the FRESH or ACTIVE queue:

```
Queue = 'FRESH' OR Queue = 'ACTIVE'
```

4. To select all records whose Name column includes the Unicode text "Smith":

```
Name LIKE N'Smith'
```

5. To select all records that have an appointment on 23 February 2006:

```
AppointmentTime >= '2006-02-23' AND AppointmentTime < '2006-02-24'
```

6. To select all records whose Test column is not null:

```
Test IS NOT NULL
```

To Display Records without Updating Them

- In the Selection Criteria text box, type your expression. To select all records, make sure that the Selection Criteria text box is empty.
- Make sure that the Update text box is empty.
- Click Apply.

The list of participant records will now include only those records that match your selection criteria. If there are more records than will fit on one page, use the icons at the bottom of the page to navigate between pages.

Performing a Bulk Update

You define the update that you want to perform on the selected records by typing an expression of the following form:

column_name = new_value

column_name

Specifies the name of the column on the sample table. You must always type the column name so that its case matches the case of the field name as displayed in Participants. This rule applies even when the sample database has been set up to be case-insensitive. In addition, you can specify only a column that you have access to—see Controlling Access to Data and Features for more information.

new_value

Specifies the value that will be assigned to the column. For more information, see the description of **value** in "Selecting Records" above.

You can update several columns at once by separating the expressions with commas.

To Perform a Bulk Update

- In the Selection Criteria text box, type an expression that specifies the records that you want to update. See "Selecting Records" above for more information. To select all records, make sure that the Selection Criteria text box is empty.
- In the Update text box, type an expression that specifies the update that you want to perform. For example, to assign all selected records to the APPOINTMENT queue and change the value of the PreviousQueue column to SILENT, type the following:

```
Queue = 'APPOINTMENT', PreviousQueue = 'SILENT'
```

- Click Apply. This opens a "Confirm Update" dialog box.
- Click OK. After a brief pause, another dialog box opens to confirm the number of records that were updated.
- Click OK to close the dialog box.

The list of participant records will now include only those records that match your selection criteria. If the columns that you updated are visible, the new values are displayed.

Deleting Records

Warning: Do not delete participant records from telephone interviewing projects, as this can cause phone reports to show unexpected results. You can delete participant records only if you have been assigned the Participants activity feature "Can delete participants"—see Controlling Access to Data and Features for more information.

- On the View tab, select the check box on the left of the record or records that you want to delete. Alternatively, if you want to delete all the records on the page, select the check box on the left of the field names.
- Click the Delete icon in the top-right corner of the list of records as shown below:

- To confirm the deletion, click OK.

  After a brief pause, another dialog box opens to confirm that your deletion was successful.
- Click Close.

  The list of participant records refreshes to no longer show the deleted records.

Downloading Records

You can download one, some, or all participant records to a text (*.csv*) file. The data in the file will be in the correct format for uploading into another sample table and will adhere to standard *.csv* file conventions. Refer to Comma-separated values (*http://en.wikipedia.org/wiki/Comma-separated_values*) for more information regarding *.csv* files. All downloaded *.csv* files are encoded in 8-bit Unicode Transformation Format (UTF-8). As such, you must ensure that whichever tool you choose to open the encoded files is UTF-8 compliant.

Warning: Downloading a very large number of participant records might affect the performance of IBM® SPSS® Data Collection Interviewer Server. For more information, see the topic Participant File Format on p. 81.

To Download All Records

- On the View tab, click the Download All icon in the top-right corner of the list of records as shown below:

- When prompted, choose whether to open the text file in the associated program or save it to the location of your choice.

To Download a Selection of Records

- On the View tab, select the check box on the left of the record or records that you want to download. Alternatively, if you want to download all the records on the page, select the check box on the left of the field names.

- Click the Download icon in the top-right corner of the list of records as shown below:

- When prompted, choose whether to open the text file in the associated program or save it to the location of your choice.

Note: When downloading a selection of records, you cannot download more than the maximum number of records that can be included in a single page on the View tab. By default, this is 1000 records, which is the largest value that can be selected from the Display Options list on the View Settings tab. However, it is possible for an administrator to customize the Participants activity to include values greater than 1000 in the Display Options list. For more information, use the search function in the IBM® SPSS® Data Collection Developer Library documentation to search for the text "Settings for the Participants Activity" and in the search results open the topic with that title.

Controlling Access to Data and Features

You can restrict access from the Participants activity to specified servers, databases, tables, and columns by adding entries to the *SampleMgtGUI.Config.xml* file. For more information, use the search function in the IBM® SPSS® Data Collection Developer Library documentation to search for the text "Controlling Access to Sample Data" and in the search results open the topic with that title.

Note also that only fields that were selected on the Sample Management tab of the Launch activity when the project was activated can be viewed in the Participants activity.

Controlling Access to Data by the Sample Management System

You can specify that one or more columns in your sample table are read-only and cannot be updated by IBM® SPSS® Data Collection Interviewer Server's sample management system. To do this, you need to use DPM (Distributed Property Management) Explorer as follows:

- In Windows Explorer, run *DPMExplorer.exe*, which by default is located in the *[INSTALL_FOLDER]\IBM\SPSS\DataCollection\6\DDL\Code\Tools\VB.NET\DPM Explorer.Net* folder.

- In the left pane, expand the top-level node (the site name) and then expand the following nodes:
Servers > <your server name> > SampleManagements > <your IBM® SPSS® Data Collection Interviewer Server Administration project name> > Queueing > Queues > Properties

- From the Add menu, choose Property. This opens a dialog box.

- In Name, type ReadOnlyFieldColumns. In Value, type a comma-separated list of the column names in your sample table that you want to be read-only.

- Click OK. This adds the *ReadOnlyFieldColumns* property to DPM.

Controlling Access to Features

You can control access to the various features in Participants by assigning users or roles to Participants' activity features. The activity features that you can use are shown in the following table.

Activity Feature Name	Description
Can advanced edit participants	Whether the advanced option can be used for selecting and updating records on the View tab.
Can create databases	Whether a new database can be created on the Upload tab.
Can delete participants	Whether participant records can be deleted on the View tab.
Can download participants	Whether participant records can be downloaded on the View tab.
Can edit participants	Whether participant records can be edited on the View tab.
Can upload participants	Whether the Upload, Required Fields, and Additional Fields tabs are visible.
Can view participants	Whether the View and View Settings tabs are visible.
Can view summary	Whether the Summary tab is visible.

By default, the CATISupervisor role is assigned to all the activity features shown above apart from "Can advanced edit participants", "Can create databases", and "Can delete participants".

For more information about activity features, search the *Interviewer Server Administration User's Guide* for the topic "Assigning Users or Roles to Activity Features".

Launch

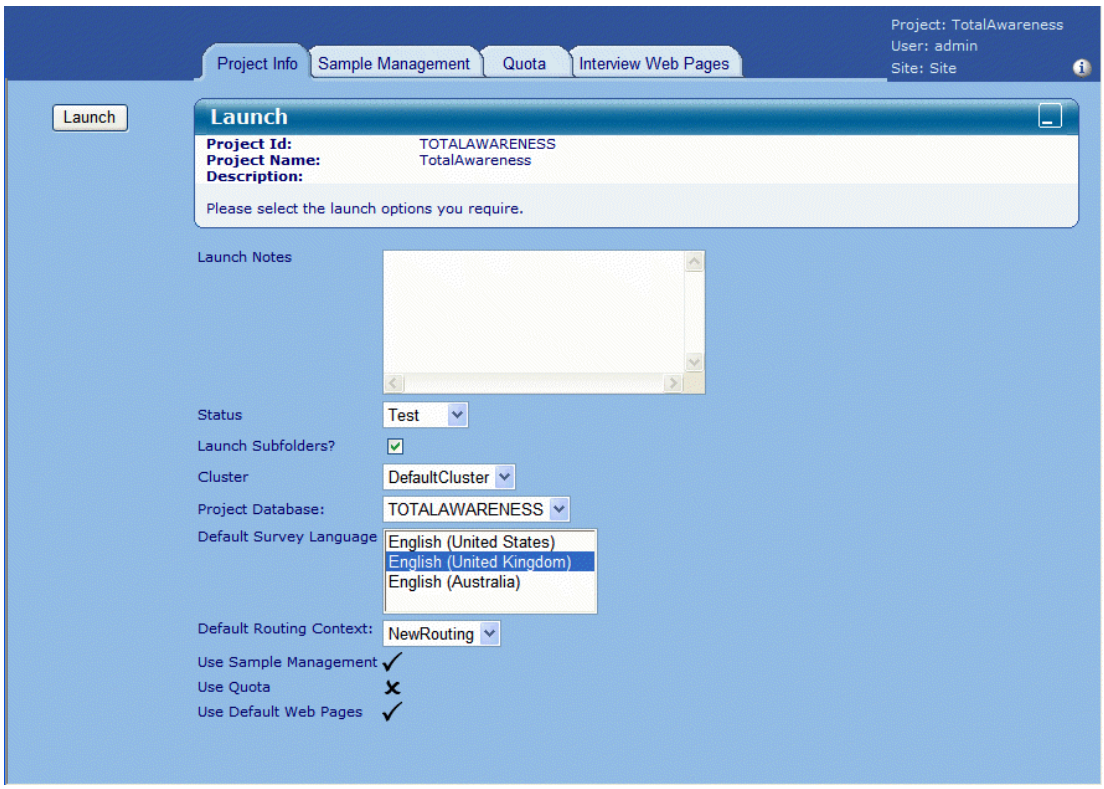
You use Launch to activate a compiled questionnaire so it can be used for interviewing. This involves defining the location of participant records for the project, naming the quota file if the project uses quota control, and defining which Web pages to use for standard items such as the start and end of an interview.

You can run Launch from within Build or you can run it separately by selecting it from IBM® SPSS® Data Collection Interviewer Server Administration.

Starting Launch

- Select the project you want to activate and click Launch.

Project Information



The Project Info tab is where you enter general information about the project and where and how it is to be activated. The information required is as follows.

Launch Notes. Background information about the project that you want to save in the project database for reference by other users. You can leave this box blank.

Status. The project's status. One of the following:

- **Test.** The project is available for testing, but any data collected will be flagged as test data.
- **Active.** The project is available for live interviewing.
- **Inactive.** The project cannot be used for test or live interviewing.

Project Expiry (UTC Time). Provides options for specifying a project expiration time.

- **Date:** The project expiration date. You can manually enter a date, in the format mm/dd/yyyy, or you can click the down arrow to display a calendar and select a date.
- **Time:** The project expiration time. This indicates the exact time of day, for the selected date, that the project will expire. Enter an appropriate time in the 24-hour format hh:mm (for example 17:00 for 5:00 PM).

Launch Subfolders? Select this option if the project's folder contains localization subfolders that must be copied to the Shared and Master project folders along with the main project files.

Cluster. The cluster on which to activate the project. If you are activating a project that has already been activated — for example, if you have changed and recompiled the questionnaire — you must activate it on the same cluster as you used before.

Project Database. The name of the case data database. The default is to store each project's data in a separate database with the same name as the project. However, if your site is configured to allow it, several projects can write case data to the same database.

You may also be able to create a new database for the project with a name of your choice. If so, the drop-down list will contain the "Create New Custom Database" option. Select this option and then type a name for this database in the Custom box that appears next to the Project Database box.

Default Survey Language. The default language for the questionnaire.

With multilingual questionnaires, the language in which you write the questionnaire automatically becomes the default (or base) language for that script. If the questionnaire does not specify the language in which it is to run, and the information cannot be obtained from the participant record, the interview will run in this language. Once you start translating a script, other languages are added to the questionnaire definition file and you may want to select one of those languages as the base language for the questionnaire.

The language list contains only languages that are present in the questionnaire definition file. If the computer's default language does not appear in the questionnaire definition file, the language list defaults to US English.

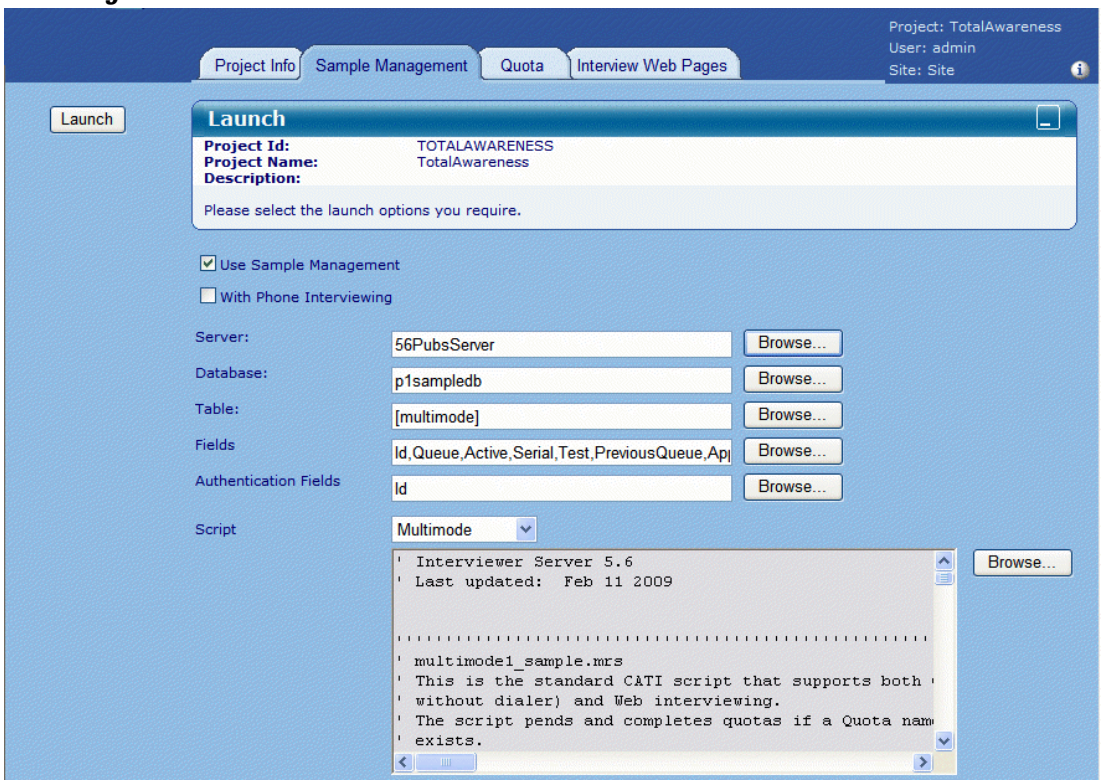
Default Routing Context. The routing context to set as the default for this project. The activation process activates all routing contexts that it finds but only sets one as the default. Typical routing contexts are Paper for printed questionnaires, Web for inbound interviews, and CATI for outbound calling.

The Sample Management, Quota, and Interview Web Pages lines show whether these options have been set for this project. The settings change according to the specifications on the other tabs.

Defining project information

- Select the Project Info tab.
- Enter or select values as described above.

Sample Management



If you select Use Sample Management on the Sample Management tab, you will be prompted to enter the Sample Management requirements. You must provide the following details.

With Phone Interviewing. Select this checkbox if the project will use CATI for outbound calling.

Server. The name of the server on which the participant database is located. The Browse list contains only those servers that are present in your current domain. If you want to use a server in another domain, you must enter its name manually.

Database. The name of the participant database. The Browse list displays the names of databases that you have permission to use and that exist on the chosen server.

Table. The table in this database that contains the participant records for this project. The Browse list displays the names of tables in the chosen database.

Fields. The columns of participant information to use from this table. The Browse list shows the column names present in the chosen table. Sample Management requires columns labeled *Id*, *queue*, *active*, and *serial* to function properly.

Authentication Fields. The columns that are to be used for authenticating the participant record associated with an inbound call before allowing an interview to start. The fields displayed in the browse list are those that you selected in Fields.

Script. The Sample Management script for the project. You can either select a predefined script from a list or load a script of your choice using the Browse button.

Note: Sample management scripts are currently implemented as mrScript and should therefore have the *.mrs* extension.

Script Type. The script type, either IBM® SPSS® Data Collection or VBScript. This box is displayed only if you have permission to edit sample scripts[1]. You can use it to select the type of scripts you want to choose from. If this box displays one script type and you choose a script of a different type using the Browse button, Launch updates the Script Type box to reflect the script type chosen.

Defining sample management parameters

- On the Sample Management tab select Use Sample Management.

  The page is redrawn with prompts for Sample Management parameters.

- If the project allows CATI, select With Phone Interviewing. When the project is activated, this will make the various CATI activities available in the activity list.

- In Server enter or select the server containing the participant database.

- In Database enter or select the name of the participant database.

- In Table enter or select the name of the participant table.

- In Fields select the columns that you want to be available to your Sample Management script using standard Windows selection methods.

- In Authentication Fields select the columns that will be used for authentication of participants making inbound calls. If you need to be able to select specific participant records, you should select the *Id* column because this is a key to the database and is guaranteed to contain a unique value for each record. If you authenticate on a column that may contain non-unique values, the Sample Management system will select the first record whose value in that column matches the values specified in the Sample Management script.

- To specify which Sample Management script to use, do one of the following:
  - Select a script from the predefined selection list in the Script drop-down list. The list you see here can be customized by your Data Collection administrator, so the scripts that you see may differ from the scripts that your colleagues see.
  - If the script does not appear in the selection list, click Browse and upload the file.

  In both cases, the script will then be displayed in the script listing box and may sometimes be edited. (Script editing is an optional facility that your Data Collection administrator can make available if required[1].) If the Script Type box is displayed and you chose a script of a different type to the one shown in the box (for example, a VBScript script when the box shows Data Collection) the text in this box is updated to show the type of script you have chosen.

[1] For details of how to enable the facility to edit sample management scripts, see "Settings for the Launch Activity and the Desktop Activation Program" in the IBM® SPSS® Data Collection Interviewer Server section of the IBM® SPSS® Data Collection Developer Library documentation.

Quota

If you select *Use Quota* on the Quota tab, you will be prompted for information about the quota database for this project and how it is to be affected by the activation process.

When a project uses quota control and you activate it for the first time, Launch creates a new quota database for the project using the information in the project's quota document (*.mqd*) file.

The quota database is a set of tables whose names start with QUOTA and which the activation process creates inside the project database. They contain definitions of the quota groups and their targets and, once interviewing starts, counts of completed, pending, and rolled back interviews for each group. The quota document (*.mqd*) file is the file that the IBM® SPSS® Data Collection Quota Setup program creates when you save the quota definitions and targets. Launch uses it to determine the structure and content of the quota database it is to create. The *.mqd* file is not used during interviewing.

Do not update the quota definitions on the server: When selected, quota definitions on the server will not be updated.

Publish new quota definitions, but do not update existing quotas: When selected, any new definitions are updated to the server, but existing definitions on the server remain unchanged.

Resynchronize quota database with this project's mqd: Once a quota database exists, this check box is always activated but is unchecked. If you have made changes to the *.mqd* file, you should select this check box if you want these changes to be implemented in the quota database.

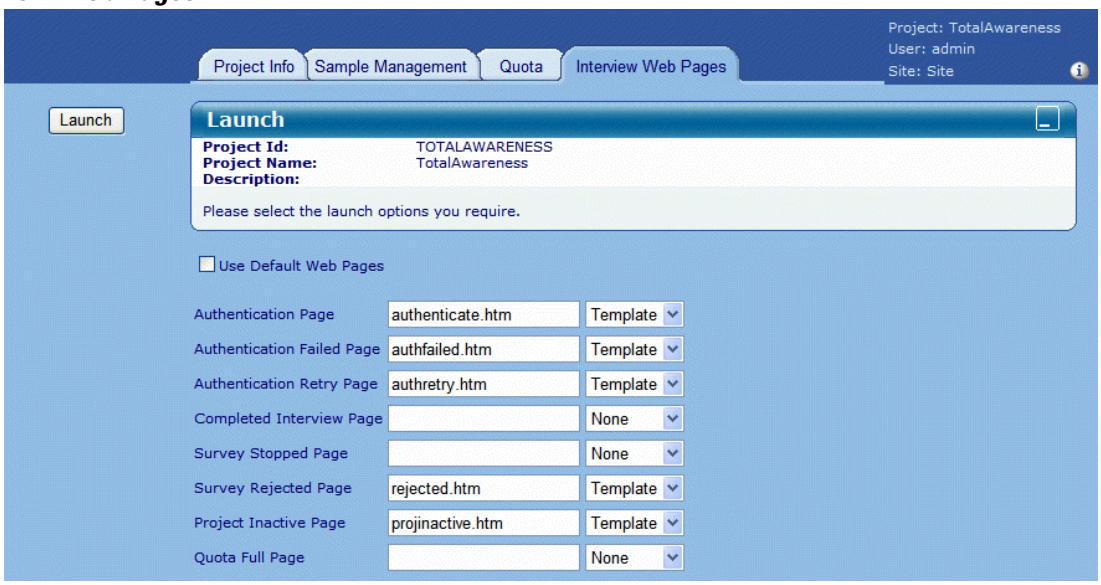
Note: If you have changed quotas using the Quotas activity these changes will have been written to the quota database but will not appear in the project's *.mqd* file. If you choose to activate using the *.mqd* file, the changes you made with the Quotas activity will be lost. If you want to keep these changes, you will need to make them in the *.mqd* file using Quota Setup before reactivating.

Defining Quota information

- On the Quota tab select Use Quota.
- Click Browse and select the name of the project's quota database.

- If this is the first time this project has been activated with Quota Control switched on, click Create New Quota. The exception is when your project shares quotas with another project. In this case, if the shared quota database already exists, select the quota from the list instead.
- If this project has been activated with Quota Control before, select the name of the project's quota database from the list. If you have changed the project's *.mqd* file and you want to update the quota database with these changes, click Resynchronize quota database with this project's mqd.

Interview Web Pages



If you deselect *Use Default Web Pages* on the Interview Web Pages tab, you will be able to specify the names of your customized Web pages for standard events such as starting and stopping an interview.

There are seven customizable pages, of which five have defaults. You can find the default files in the [INSTALL_FOLDER]\IBM\SPSS\DataCollection\6\Interviewer Server\Server\mrIWeb\Templates folder.

Authentication Page. The page to display when a project uses Sample Management and you need to verify that the person taking the interview is a member of the participant group. The default is a template called *authenticate.htm* that displays the message 'Please enter your authentication information'.

Authentication Failed Page. The page to display when authentication fails. The default is a template called *authfailed.htm* that displays the message 'Your authentication information is incorrect'.

Authentication Retry Page. The page to display when authentication of a prospective participant against the participant database fails, and you want the participant to re-enter the authentication details. The default page is a template called *authretry.htm* that displays the message 'The authentication information you have entered is incorrect. Please try again'.

Completed Interview Page. The page to display at the end of the interview (that is, when the participant has answered all relevant questions in the questionnaire). There is no default page, but IBM® SPSS® Data Collection Interviewer Server itself displays 'End of interview. Thank you for your participation'. Note that if the interview ends with a `display` statement, this text is displayed as the last page of the interview instead.

Survey Stopped Page. The page to display when the participant stops an interview or the interview is stopped by a *stop* or *signal* statement in the script. There is no default page but Interviewer Server itself displays 'End of interview. Thank you for your participation.'

Survey Rejected Page. The page to display when a participant fails authentication and no retry prompt is required, for example, when the participant fails quota control. The default is a template called *rejected.htm* that displays the message 'Thank you for your interest in participating in this survey.'

Project Inactive Page. The page to display when the participant attempts to start an interview for an inactive project. The default is a template called *projinactive.htm* that displays the message 'Please come back later'.

Quota Full Page. The page to display when an interview is terminated because the respondent belongs in a category whose quota target has already been met.

Note: You can specify all pages except Authentication and Authentication Retry as templates or URLs. For these two pages we strongly recommend using only templates, as URLs can result in an interview having two connections IDs.

If you specify a page as a template, the file must be present in the project's source directory or in [INSTALL_FOLDER]\IBM\SPSS\DataCollection\6\Interviewer Server\Server\mrIWeb\Templates. In both cases, you select the file using a simple filename not a pathname. When the project is activated, templates that exist in the project's source directory will be copied to the project's directory [INSTALL_FOLDER]\IBM\SPSS\DataCollection\6\Interviewer Server\Projects. When interviews take place, the interviewing program will look for the templates first in the project-specific directory and then in the main Projects directory.

Selecting non-default Web pages

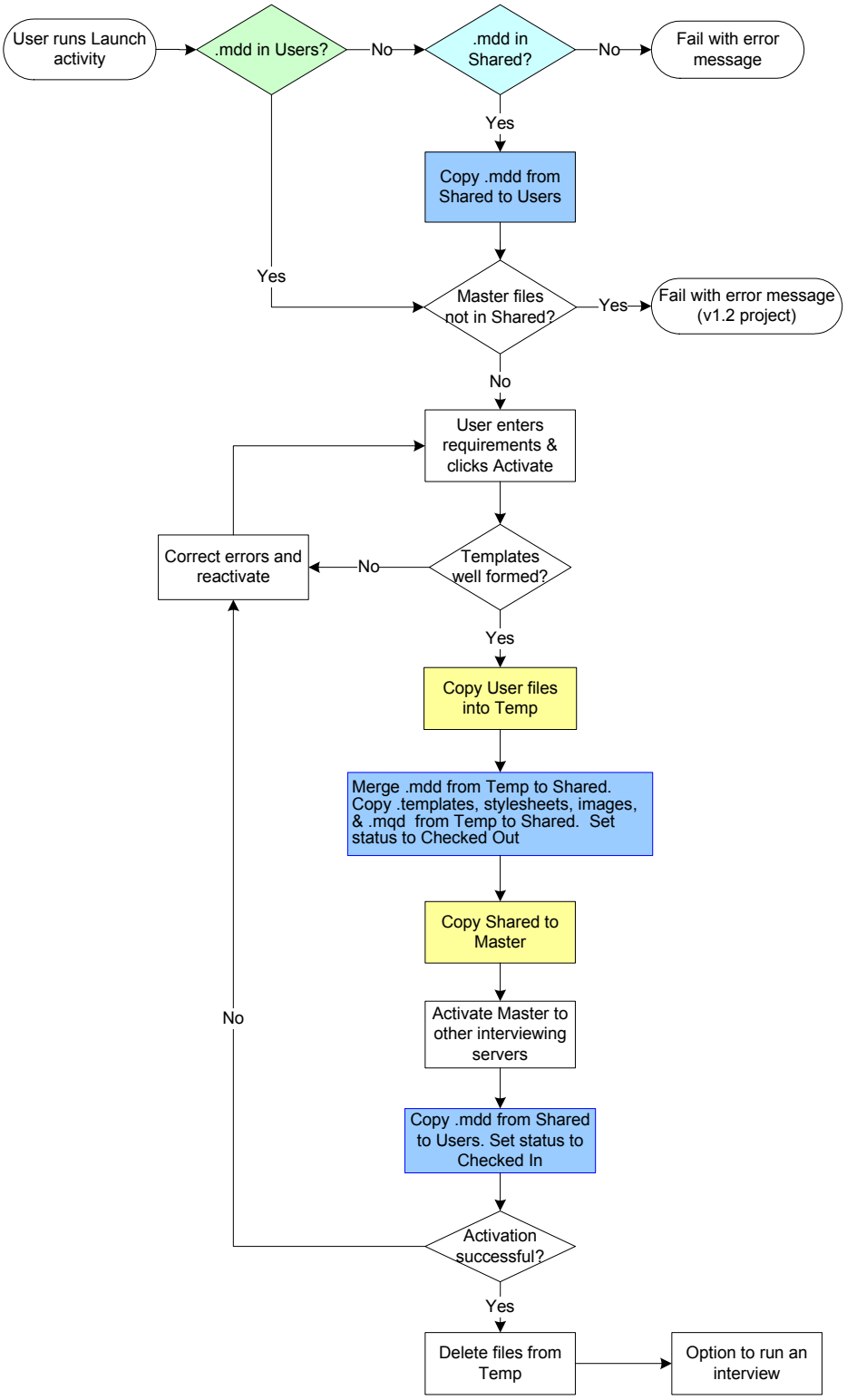
- On the Interview Web Pages tab deselect Use Default Web Pages.
- For each page that you want to define, in the first box, type the name of the template file or the full URL that defines the page to be displayed.

  Note: Templates must be entered as simple filenames not as pathnames.
- In the second box, choose Template or URL. Alternatively, to deactivate an existing page without replacing it with a new page, choose None.

Activation Process

When you have entered all the necessary information on the four tabs you can activate the project. The flowchart illustrates the activation process, which is described in more detail below the flowchart.

Figure 1-8
Activation flowchart


User runs Launch activity
.mdd in Users?
No
.mdd in Shared?
No
Fail with error message
Yes
Copy .mdd from Shared to Users
Yes
Master files not in Shared?
Yes
Fail with error message (v1.2 project)
No
User enters requirements & clicks Activate
Correct errors and reactivate
No
Templates well formed?
Yes
Copy User files into Temp
Merge .mdd from Temp to Shared. Copy .templates, stylesheets, images, & .mqd from Temp to Shared. Set status to Checked Out
Copy Shared to Master
Activate Master to other interviewing servers
Copy .mdd from Shared to Users. Set status to Checked In
No
Activation successful?
Yes
Delete files from Temp
Option to run an interview

When you start Launch, the key points of the activation process are as follows:

- If the Users folder does not contain a *.mdd* file, Launch is unable to start. If the file is not present in the Users folder but is present in the Shared folder, then it is copied into the Users folder and activation can begin.
- Launch then checks whether there are files for this project in FMRoot\Master that are not present in FMRoot\Shared. If this is the case, activation fails since it is possible that the project may be a version 1.2 project that has not been upgraded to work with later versions.
- Once the file checks have been carried out you can enter your activation requirements. Click Activate when you are ready to activate the project.
- Launch checks the project's template (*.htm*) files to ensure they contain well formed HTML. If files are not well formed, Launch displays a message box listing the names of the files that are incorrect. Each filename is followed by a warning icon (a ! symbol in a triangle) which you can hover over to see a description of the error. To save the contents of the message box to a file, click Copy to Clipboard and then paste the clipboard into a file of your choice. Click Proceed to continue activating or Cancel to stop.
- Launch copies the project's *.htm*, *.xml*, *.mdd*, and *.mqd* files, as well as any image files, into a subfolder within your *UserName*\Temp folder. This is a safety precaution that ensures that any changes made by other users to the User files during activation cannot affect the activation process.
- Launch copies the files from *UserName*\Temp folder into FMRoot\Shared. If an *.mdd* file already exists in the shared project folder, Launch merges the newer version of the file into the existing file and displays a progress box while this happens. If the merge fails an error message is displayed.

  Launch adds the datasource connection string for the project's case data to the *.mdd* file.
- Launch copies the project's folder from FMRoot\Shared into FMRoot\Master. If an *.mdd* file already exists in the shared project folder, Launch merges the newer version of the file into the existing file.
- Launch contacts each interviewing server and tells it to update its project files. Each interviewing server responds by copying the new or updated files from the Master folder into the local project folder in [INSTALL_FOLDER]\IBM\SPSS\DataCollection\6\Interviewer Server\Projects.

The activation process checks that all interviewing servers have the same version of the ActivateServer.dll component installed as is installed on the machine you are working on. If it finds a mismatch, activation fails at that point and you will have mismatched project files on the interviewing servers. When this happens, you may usually continue by manually copying the project files to the servers that have not been updated. However, the best solution is to ensure that all machines in the cluster are running the same version of IBM® SPSS® Data Collection Interviewer Server.

- Launch copies the *.mdd* file from the Shared folder back to the User folder (effectively doing a check in and check out). This ensures that, if merges took place, you have the most up to date version of the file in your User folder. If there are other files in the Shared folderthat are newer than the versions in the User folder, these are also copied.
- If all these steps run successfully, the files are deleted from the Temp folder.

Activating a project

▶ Click Launch.

When activation is complete, a message box lists two URLS for running interviews. The first one is for live interviews; you can copy this URL to the clipboard for pasting into a Web page. The second one is for designers wishing to test their questionnaires; data for these interviews is flagged as test data in the case data database so that it can be ignored in analyses and exports of the final survey data.

▶ If activation is successful and you want to run a test interview, click Copy to Clipboard next to the URL for designers who want to test their questionnaires. You can then pate this URL into a new browser window to test the questionnaire.

▶ Click Close Window.

Notes

The .NET Framework's default encoding reads the registry's ANSI codepage when encoding. As a result you may encounter errors when activating questionnaires that include characters such as umlauts (for example, when the project name contains the character Ä). You can resolve this issue by updating the server's ANSI codepage:

1. Access the registry on the server (Start > Run >regedit).
2. Navigate to *HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Control\Nls\CodePage\ACP*
3. For servers running a German operating system, enter a value of 850; for Chinese, enter a value of 936; for Japanese, enter a value of 932.

   Refer to Encoding Class (*http://msdn.microsoft.com/en-us/library/system.text.encoding.aspx*) on the Microsoft MSDN site for more information.

Promote Project

You use Promote Project when you want to activate a project from one cluster to another. This might be required where you have separate clusters for test and production work. You create and test projects on the test cluster and then activate them to the production cluster when the project is ready to go live. Since activation is usually between clusters on different sites, you may hear this type of activation referred to as **site to site activation**.

You can also use Promote Project to activate projects over the internet when you do not have a direct connection to your cluster.

Starting Promote Project

▶ Select the project you want to activate and click Promote Project.

The Promote Project login dialog box is displayed.

Logging in to the Destination Server

In order for activation to work, you must be logged in to the Activate component on your current machine and the destination machine. When you start Promote Project, you are prompted to log in to the destination machine — that is, the project management server to which you want to activate.

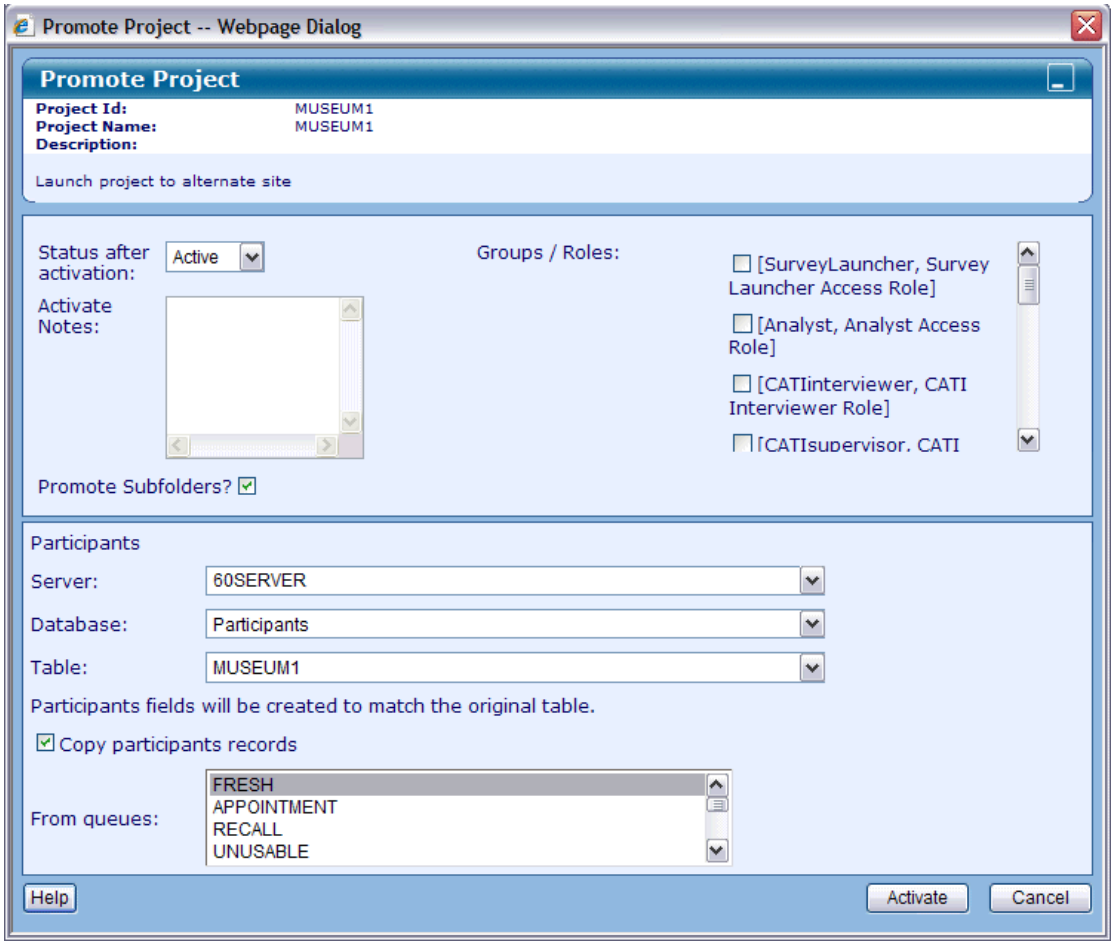
The first time you use Promote Project you will need to complete all the fields on the login dialog box, but after that all fields except password will be filled in with the values you used the previous time.

- In Destination Server or IBM® SPSS® Data Collection Interviewer Server Administration URL, do one of the following:
  - If you are connected to your local network, type the name of the project management server on the cluster you want to activate to.
  - If you are not connected to your local network, you can activate across the internet by typing the URL for Interviewer Server Administration on the cluster to which you want to activate.
- In Destination User Name, enter the user name that you want to use for logging in on the destination server. In many cases this will be the same as the Interviewer Server Administration user name that you are currently using, but if you do not have access to the destination server using this name then you may enter a different name here.
- In Destination User Password, type the password for this user.
- In the Authentication drop-down menu, select either IBM® SPSS® Data Collection Interviewer Server Authentication or Windows Authentication. Refer to the "Configuring for Single Sign-on" topic in the *IBM® SPSS® Data Collection Developer Library* for more information.
- Click Login to log in to the destination server.

Specifying the Activation Parameters

Once you have logged on to the destination server, the second Promote Project dialog box is displayed. You use this dialog box to specify activation parameters. Note that the Participants frame is displayed only if the project has already been activated with sample management.

Figure 1-9
Site-to-Site Activate dialog box



If the project already exists on the destination server, a message explaining this is displayed at the top of the dialog box. You may continue activation and overwrite the existing project files or cancel it leaving the existing project files intact.

- In Status after activation, select the status that the project will have once it has been activated.
- In Activate notes, type any notes you want to make about this activation.
- In Groups/Roles, select the roles that will have access to the project on the destination server. If the project already exists on that server, the check boxes show the current permissions for that project on that server. If it does not, Promote Project selects the roles that have access to the project on the originating server.
- Select Promote Subfolders to indicate whether subfolders will be promoted with the project files. This option is enabled by default. Turning this option off should only be done if the project does not require subfolders, or if the project already exists and the subfolder content has not changed.
- If the project has participant records that you want to copy as part of the activation procedure, use the boxes in the Participants frame to specify where the records can be found and where they

should be placed. Note that your IBM® SPSS® Data Collection administrator can customize the behavior of the fields in this frame so that, for example, you cannot change the names of the server, database, and sample table, or you cannot choose which queues to copy from.

- In Server, choose the name of the database server; the default is the database server for the destination cluster. If the server's name does not appear in the drop-down list, click Enter name and type the name when prompted to do so.
- In Database, select the name of the sample database in which the sample table should be created; the default is a database with the same name as on the originating server. If you want to create a new database, click New and enter the database name when prompted to do so.
- In Table, select the name of the sample table to which the participant records should be added; the default is a table with the same name as on the originating server. If you would prefer to create a new table, click New and enter the table name when prompted to do so.
- Select Copy participant records if you want to copy participant records from the local database server onto the destination machine's database server. Note that if the sample table already exists on the destination machine, only new records will be copied. (This matches the behavior of the Participants activity that uploads only records with new IDs.)
- In From queues, use Shift+Click or Ctrl+Click to select the queues from which to copy records. The default is to copy records from the FRESH queue only.

▶ Click Activate to start the activation procedure.

During activation, a progress dialog box tells you what the activation procedure is doing. It's useful to watch these messages as they will help you locate problems if activation fails.

Promote Project attempts to create or update the schema (definition) of the sample table on the destination server so that it matches the schema of the table on the originating server. If this is not possible, perhaps because a field already exists in the destination table but with a different data type, then Promote Project issues an error and you will have to choose a different table name.

The activation process checks that all interviewing servers have the same version of the ActivateServer.dll component installed as is installed on the machine you are working on. If it finds a mismatch, activation fails at that point and you will have mismatched project files on the interviewing servers. When this happens, you may usually continue by manually copying the project files to the servers that have not been updated. However, the best solution is to ensure that all machines in the cluster are running the same version of IBM® SPSS® Data Collection Interviewer Server.

When activation is complete, Promote Project displays the SPSS Activate dialog box giving URLs for running interviews on the destination server.

Email

You use Email to send e-mail to respondents in the sample file. For example, at the start of a project you might send a message to everyone inviting them to participate in the survey. Later, you might set up a second job that sends reminders to those respondents who have not yet taken part.

Each project has its own set of email job specifications.

Email provides the following facilities:

- **Respondent selection.** You can send e-mail to all respondents in a queue or set of queues. Alternatively, send to a fixed number of respondents chosen either from the start of the queue or at random.
- **Customized and personalized message texts.** If you want to include information from a respondent's sample record, or the value of a project property, insert a placeholder in the message text and the appropriate values will be substituted for the placeholders when the messages are sent. This allows you to address respondents by name, and to include the URL for starting the interview as part of the message.
- **Test messages.** Check how the message will appear to respondents by sending a test message.
- **Project status.** You can specify that the job should only be run if the project has a particular status.
- **Activity recording.** You can record which respondents received which e-mail by updating a field in the sample record with a note of the time and date at which the e-mail was sent.
- **No repeat e-mail.** If you rerun an e-mail job, a message is normally to everyone who is selected to receive it. You may choose not to target people who received this message during a previous run.
- **Delayed sending of e-mails.** There is no direct link between setting up an e-mail job and running it. All job specifications are saved and are run only when selected from a list of e-mail jobs for the current project.
- **Maintenance facilities.** Job specifications can be edited and deleted as required.
- **Dealing with e-mail problems.** You can specify the e-mail address of a user who is to be contacted if there are problems. This user is also the person who receives test e-mails.

Note: E-mail does not support SMTP servers that are set up to require authentication.

Starting Email

▶ Select the project for which you want to set up email and click Email.
This opens the Email jobs list page.

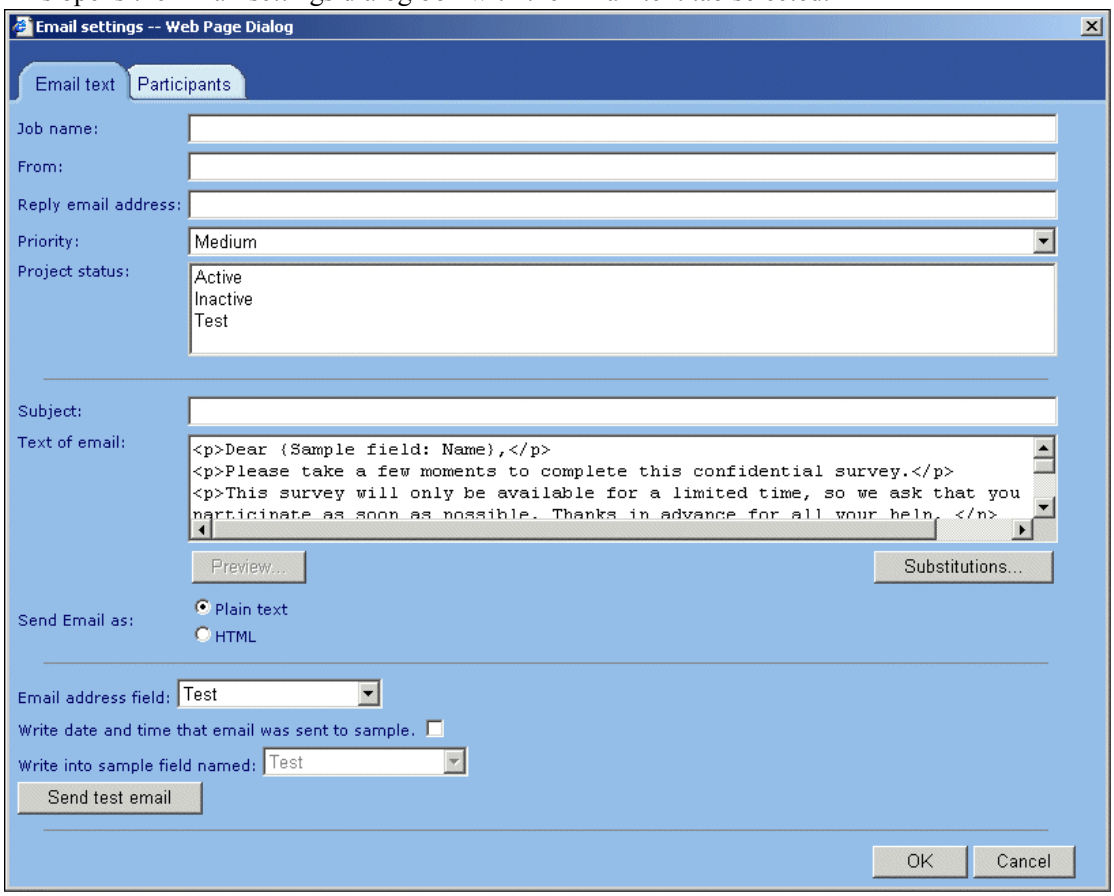
Creating a New Job

There are two stages to setting up email jobs:

- Define email parameters such as the subject and the message text, and the types of projects on which the job may be run.
- Specify which respondents will receive the email.

- Click the Add icon or Click here to add new.

  This opens the Email settings dialog box with the Email text tab selected.



- In Job name, enter a name for this email job.
- In Subject, enter a short description of what the email is about. This will appear as the message subject in the recipient's message box.
- In Reply email address, enter your name or email address or the name or email address of the person on whose behalf you are sending the message. Whatever you type here will appear as the sender's name in the recipient's message box.
- In Priority, choose the email priority from the drop-down list. You can choose either a High, Medium, or Low priority.
- In Project status, choose the status that the project must have in order for the email to be sent. You may choose more than one status if you wish.
- In Subject, type a subject for the message.
- The Text of email box displays a suggested message text, complete with substitution markers for inserting respondent- or project-specific information in the text. You can either accept this text as it is, modify it, or replace it with a new text of your own.

- If you want to insert the value of a Sample Management field or project property in the message text, click in the text at the point you want to make the insertion, then click Substitutions and choose the field or property you want to insert from the dialog box that is displayed. The property name appears in the message text enclosed in curly brackets and will be replaced by the appropriate value when the message is sent.

- In Send Email as, choose either Plain text or HTML.

  Note: If you're using HTML format you'll need to include HTML formatting codes in the message text wherever you want line breaks or new paragraphs.

- If you're sending the message in HTML format and you want to see what it will look like for recipients, click Preview.

- In Email address field, select the Sample Management field that contains recipients' Email addresses.

- If you want to record the date and time at which the message was sent as part of each recipient's sample record, do the following:
  - Click Write date and time that email was sent to sample.
  - Click Write into sample field named and choose the name of the sample field from the drop-down list.

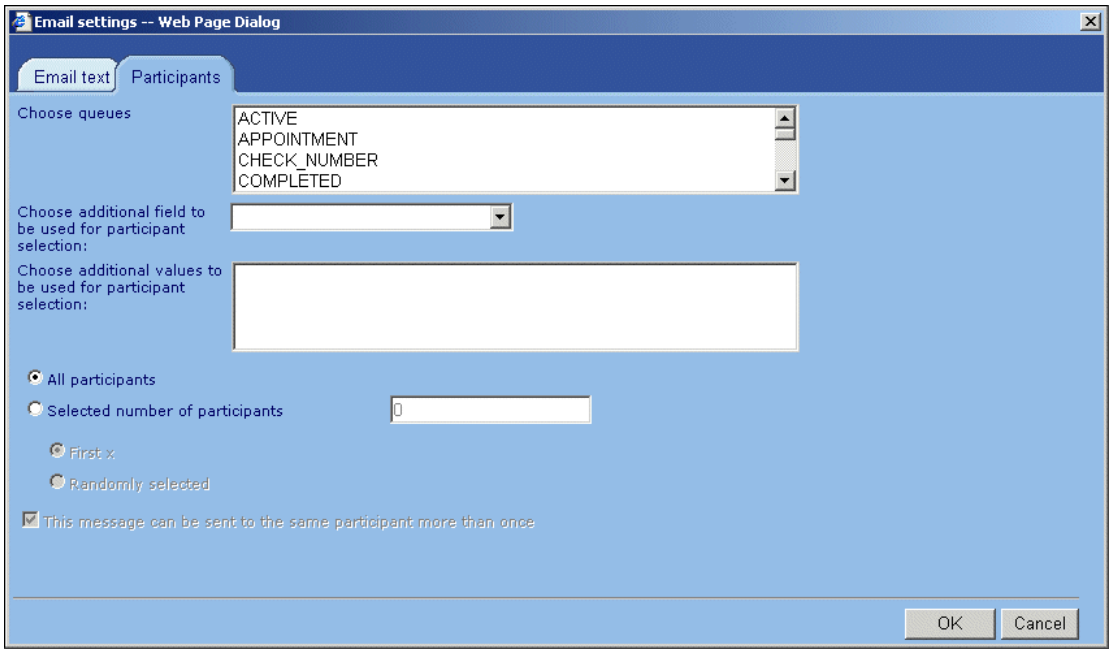
  Note: You must use this facility if you want to prevent the same message being sent to respondents more than once.

  If the respondent is sent the same message more than once, the date and time field information will be overwritten each time a new message is sent.

- If you want to send a test message, click Send test email.

  Email uses the information on this tab as the content of the message and attempts to send it to the user named on the Email jobs list page. It tells you whether or not the attempt was successful.

- Select the Participants tab.



- In Choose queues, select the queues from which recipients may be chosen.

  Note: The list of queue names shows only queues that contained sample records at the time the mrDPMServer3 service was started. This may mean that the list shows out of date information, for example, because records have been moved into a queue that was previously empty or because a queue that contained records is now empty. To see an up to date list of queues, you may need to ask your IBM® SPSS® Data Collection Interviewer Server administrator to stop and restart the mrDPMServer3 service.

- To restrict your selections even further do the following:
  - In "Choose additional field to be used for participant selection", choose a field. The list shows all fields in the sample table except Queue.
  - In "Choose additional values to be used for participant selection", choose the values that the field must contain in order for respondents to be selected. The list shows all values present in the chosen field.

- Either choose All participants or do the following:
  - Click Selected number of participants and enter the number of participants you want to email in the box provided.
  - Click First x to select respondents from the top of the list of those matching the selection criteria, or Randomly selected to choose respondents from the list at random.

- If appropriate, select This message can be sent to the same participant more than once.

  Note: This option is available only if you chose to save the date and time at which the message was sent. Email displays the name of the field that will be used for checking whether mail has

been sent before; it is the same as the field that you chose in *Write to sample field named* on the Email text tab.

▶ Click OK.
The jobs list is updated with the job you have just defined.

Running an Email Job

▶ In the Email jobs list, click Send now for the job you want to run.

The Send Mail dialog box reports the job's progress.

Naming a User for Test and Problem Messages

When you test an email project, Email always sends the message to a single specified user. This user is also the recipient of any emails that are generated if there are errors while an email job is running. You define this user on the Email jobs list page so that the same name can be used for all jobs belonging to the project.

▶ In the text box at the foot of the Email jobs list, type the email address of the user who is to receive test and problem emails.

Editing an Existing Job

You can edit an existing job to change any of its parameters or simply to check them before you run the job. Any changes you make are saved automatically when you click OK.

The jobs list shows the status of each job. This can be:

- **Incomplete.** The job does not have all the necessary parameters specified.
- **Ready.** The job is ready for running.
- **Sent.** The job has been run once.
- **Sent (n).** The job has been run *n* times.

▶ In the jobs list, double click the job you want to inspect or change, or select the job and click the Edit icon.

This opens the Email settings dialog box and displays the job's settings.

▶ Make your changes, if any, and click OK.

Deleting Jobs

▶ In the list of jobs, select the job you want to delete and click the Delete icon.
The project is deleted immediately. There is no prompt for confirmation.

Phone Surveys

Phone Surveys lets you specify the following information for a telephone interviewing project:

- Which Sample Management fields are required in the participant records, which fields should be displayed on the interview page, and which of the displayed fields interviewers can edit.
- Whether soft appointments (that is, appointments that are set automatically for numbers that are busy or unanswered when called) should take precedence over appointments that have been arranged between participants and interviewers.
- The amount of time to wait before recalling numbers that are busy, unanswered, or answered by an answering machine. The Sample Management script uses these elapse times to set the appointment times for the next calls to these numbers.
- The maximum number of times a number may be called before it is no longer eligible for calling.
- The times at which participants may be called on weekdays and at weekends.
- The time zones in which participants are located. These time zones should match the time zones stored in the TimeZone field in the participant records. Records with time zones that do not match those specified with Phone Surveys or that have a blank TimeZone field will never be used. If you do not specify the project's time zones, IBM® SPSS® Data Collection Interviewer Server will ignore time zone and calling time parameters when selecting records for interviewers to call.
- Additional call outcome codes to appear in the list that is displayed for interviewers.
- Whether interviewers can retrieve specific participants from the sample database.
- Whether the next participant for an interviewer should be selected as soon as the interviewer becomes available, rather than requiring the interviewer to click a button to request the next contact.
- Whether the project uses an autodialer, and if not, whether interviewers can use modems to dial phone numbers automatically. If an autodialer is used, you can specify a number of settings, such as whether predictive dialing should be used, whether telephone interviewer stations not configured for autodialing can be used to conduct interviews, and how long an interviewer must wait to be connected to a participant before the connection attempt is abandoned.
- Whether monitoring and recording is allowed, and whether interviewers must obtain consent from each participant for monitoring and recording.
- Whether interviewers must review completed interviews, whether the review starts automatically or must be started manually, and whether all questions or only text questions can be reviewed.

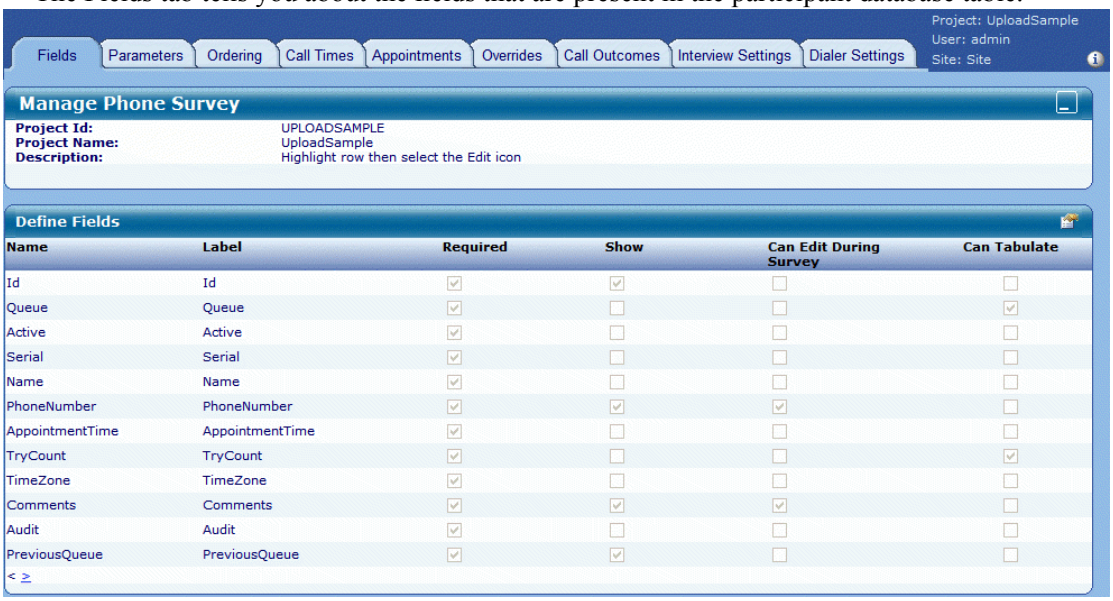
Starting Phone Surveys

► Select the project you want to work on and click Phone Surveys.

Making Sample Data Available to Interviewers

When an autodialer connects a telephone interviewer to a participant (or, for projects that do not use an autodialer, when the interviewer requests a number to call) the interviewing program displays a page showing information about the participant and a list of possible call outcomes. Some items of information are always displayed whereas other items are displayed only if selected by the supervisor. The supervisor can change the selection of optional fields during the course of the project. Supervisors can also specify for each displayed field whether or not interviewers can change the field's contents. For example, if the Comments field is displayed you might want interviewers to be able to update this field with information that might be useful to other interviewers who are about to speak to this participant.

The Fields tab tells you about the fields that are present in the participant database table.



If there are more lines of information to display than will fit on one page, the last line of the list shows < and > symbols which you can click on to scroll to the previous or next page.

Settings on the Fields Tab

Setting	Description
Label	Shows the field name that will be displayed on the interviewing screen.
Required	Shows which fields must be present in each participant record. You cannot change the settings in this column for any of the standard fields that must be present in all telephone databases, but you can change the settings for other fields.

Setting	Description
Show	Determines which fields will be displayed on the interviewing screen. Of the standard fields, the ID, Queue, Name, Phone Number, Comments, and Previous Queue fields are always displayed, so you cannot clear the Show check box for these fields. The settings in this column also define the fields that interviewers can search when searching for a specific contact. To allow interviewers to search for specific contacts, you must select the Show Specific Contact option on the dialog .
Can Edit During Survey	Determines which of the displayed fields interviewers can edit. For the standard fields, you can only change the settings for Return Time, Interview Mode, and Call Outcome.
Can Tabulate	Specifies which fields should be available to the Phone activity. The only standard field whose setting you can change is Try Count. If your sample data includes a Segment field and you want to run the reports in the Phone activity that can display data about segments, make sure that you select Can Tabulate for your Segment field. For more information about segments, .

Note: If you are using interviewer qualifications to match interviewers' language abilities to participants who speak those languages, you might want to allow interviewers to edit the field that contains the participant's language. In the event that the interviewer cannot speak the same language as the participant, the interviewer can edit the language field and select the Language Recall call outcome. An appointment will then be automatically scheduled with another interviewer whose qualification settings indicate that they can speak that language. For more information about interviewer qualifications, search the *IBM® SPSS® Data Collection Interviewer Server Administration User's Guide* for the topic "Adding Properties to User Property Groups".

To Edit the Settings on the Fields Tab

- Click on the field that you want to change and then click the Edit button as shown below:

Figure 1-10
Edit icon

- Change the settings for the Label, Required, Show, Can Edit During Survey, and Can Tabulate columns as required.
- Click Update.

Changing the Default Settings

If you find that for every new project you always change the settings on the Fields tab to the same new values, you can instead change the default settings that IBM® SPSS® Data Collection Interviewer Server provides so that you no longer need to do this. You can also define additional default fields so that you no longer need to add them to every project. For more information, see the topic Changing the Default Settings on p. 169.

Defining Sample Management Parameters

Sample Management scripts for telephone interviewing projects must perform the following tasks:

- Select records for the autodialer to call (or, for projects that do not use an autodialer, select records for interviewers to call manually).
- Set appointment times for records that were busy or unanswered when called.
- Ensure that records with appointments are presented for calling at the correct times to the correct interviewers.
- Assign records with specific requirements to interviewers with the appropriate qualifications.
- Reschedule missed appointments.
- Ensure that records are selected in a particular order of priority; for example, appointments arranged with participants, then appointments that have been set automatically, and finally new records.
- Dispose of records that become ineligible for use due to being called too many times.

The Sample Management script needs to have certain information in order to accomplish these tasks. For example, to set appointment times automatically it needs to know how much time must elapse between the previous call and the appointment. The settings you can define are as follows; the Sample Management script will use defaults for any settings that you do not define.

Setting	Description
No answer delay	The number of minutes that must elapse between consecutive calls to an unanswered number. The default is 30 minutes.
Busy delay	The number of minutes that must elapse between consecutive calls to a busy number. The default is 30 minutes.
Answer machine delay	The number of minutes that must elapse between consecutive calls to a number that was answered by an answering machine. The default is 30 minutes.
Web callback delay	The number of minutes that must elapse before a record that timed out or was stopped during a self-completion (Web) interview may be called using telephone interviewing. The default is zero which means that records for timed out or stopped Web interviews will not be called back.
Reject delay	The number of minutes that must elapse between consecutive calls to a number that rejected a call. Calls can be rejected if a mobile phone user has activated a meeting profile that rejects calls, or if a home phone has been set to reject calls that do not also transmit the caller's telephone number. The default is 1620 minutes (or 27 hours).

Setting	Description
Silent appointment	The number of minutes that must elapse between consecutive calls to a number that might have received a silent call. Silent calls can occur when an autodialer generates more connected calls than there are interviewers available to handle the calls. The default is 4320 minutes (or 72 hours). Note that when a silent call occurs, the sample management script will change the value of the Queue field on the participant record to SILENT. To ensure that the phone number will be recalled at the end of the delay, the supervisor must change the value of Queue from SILENT to APPOINTMENT.
No preference for appointments / Give preference to the interviewer who arranged the appointment	Whether the ”Before an appointment, ...” setting applies to any available interviewer, or only to the interviewer who arranged the appointment. The default is that it applies to any available interviewer. If instead, you choose that it applies only to the interviewer who arranged the appointment, and the project uses group/predictive autodialing, the interviewer will *not* be connected automatically to the participant who has an appointment. Instead, the participant’s details are displayed on the interviewer’s screen, and the interviewer must then click the Start Dialing button to dial the participant’s phone number.
Before an appointment, by any interviewer and **Before an appointment, by the arranger only** (these are actually a single setting)	The number of minutes before the appointment time when a number with an appointment can be called, either by any interviewer or the arranger only, depending on the setting of ”No preference for appointments / Give preference to the interviewer who arranged the appointment”. The default is five minutes.
After an appointment, by any interviewer	The number of minutes after the appointment time when a number with an appointment can be called by any available interviewer. The sample management script uses this setting only when the ”No preference for appointments / Give preference to the interviewer who arranged the appointment” setting is to give preference to the arranger. The default is five minutes.
Before a recall	The number of minutes before the recall time when a number with an automatic appointment can be called. The default is ten minutes.
Time zones	The time zones in which participants are located. The values that you enter in this field must be the indexes of the time zones in the list of time zones stored in the registry. If you need to enter more than one time zone, separate them with semicolons, and do not include any spaces.

Time Zone Name	Displayed As	Index Value
Greenwich Standard Time	(GMT) Casablanca, Monrovia	90

Setting	Description			
		GMT Standard Time	(GMT) Greenwich Mean Time : Dublin, Edinburgh, Lisbon, London	85
		Morocco Standard Time	(GMT) Casablanca	-2147483571
		W. Europe Standard Time	(GMT+01:00) Amsterdam, Berlin, Bern, Rome, Stockholm, Vienna	110
		Central Europe Standard Time	(GMT+01:00) Belgrade, Bratislava, Budapest, Ljubljana, Prague	95
		Romance Standard Time	(GMT+01:00) Brussels, Copenhagen, Madrid, Paris	105
		Central European Standard Time	(GMT+01:00) Sarajevo, Skopje, Warsaw, Zagreb	100
		W. Central Africa Standard Time	(GMT+01:00) West Central Africa	113
		GTB Standard Time	(GMT+02:00) Athens, Istanbul, Minsk	130
		E. Europe Standard Time	(GMT+02:00) Bucharest	115
		Egypt Standard Time	(GMT+02:00) Cairo	120
		South Africa Standard Time	(GMT+02:00) Harare, Pretoria	140
		FLE Standard Time	(GMT+02:00) Helsinki, Kyiv, Riga, Sofia, Tallinn, Vilnius	125
		Israel Standard Time	(GMT+02:00) Jerusalem	135
		Jordan Standard Time	(GMT+02:00) Amman	-2147483582
		Middle East Standard Time	(GMT+02:00) Beirut	-2147483583
		Namibia Standard Time	(GMT+02:00) Windhoek	-2147483578
		Arabic Standard Time	(GMT+03:00) Baghdad	158
		Arab Standard Time	(GMT+03:00) Kuwait, Riyadh	150
		Russian Standard Time	(GMT+03:00) Moscow, St. Petersburg, Volgograd	145

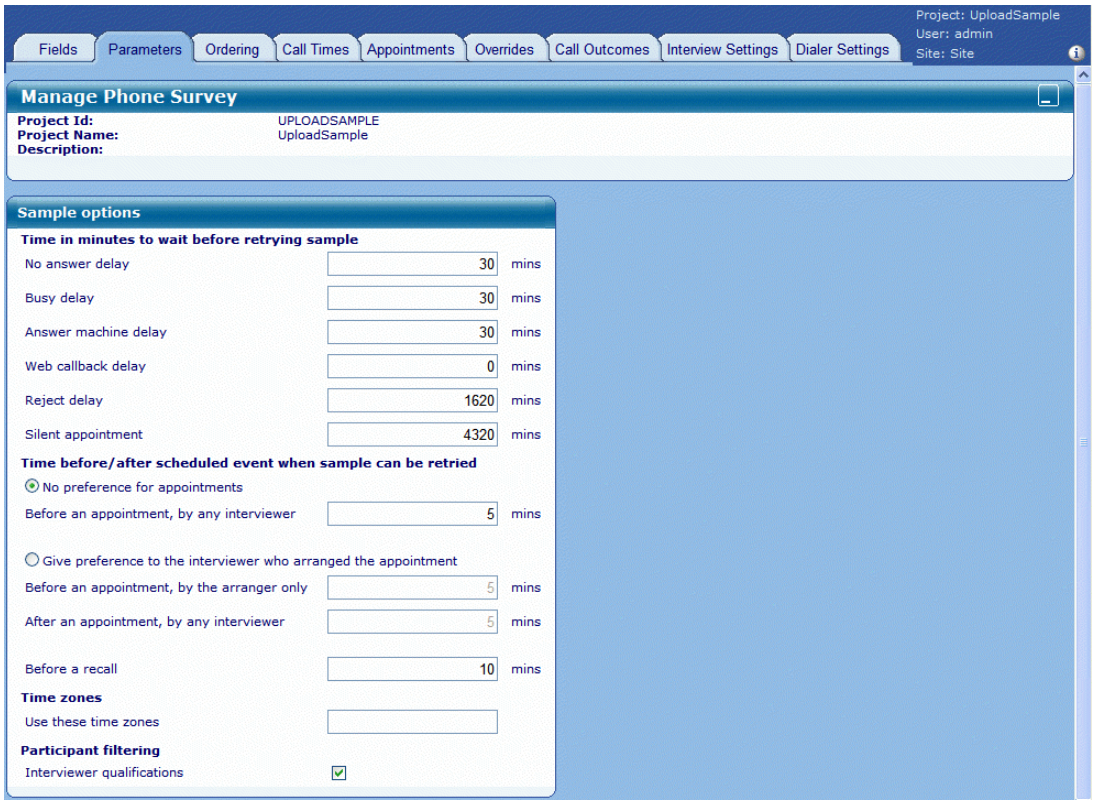
Setting	Description			
		E. Africa Standard Time	(GMT+03:00) Nairobi	155
		Georgian Standard Time	(GMT+03:00) Tbilisi	-2147483577
		Iran Standard Time	(GMT+03:30) Tehran	160
		Arabian Standard Time	(GMT+04:00) Abu Dhabi, Muscat	165
		Caucasus Standard Time	(GMT+04:00) Baku, Tbilisi, Yerevan	170
		Azerbaijan Standard Time	(GMT+04:00) Baku	-2147483584
		Mauritius Standard Time	(GMT+04:00) Port Louis	-2147483569
		Armenian Standard Time	(GMT+04:00) Yerevan	-2147483574
		Afghanistan Standard Time	(GMT+04:30) Kabul	175
		Ekaterinburg Standard Time	(GMT+05:00) Ekaterinburg	180
		West Asia Standard Time	(GMT+05:00) Islamabad, Karachi, Tashkent	185
		Pakistan Standard Time	GMT+05:00) Islamabad, Karachi	-2147483570
		India Standard Time	(GMT+05:30) Chennai, Kolkata, Mumbai, New Delhi	190
		Nepal Standard Time	(GMT+05:45) Kathmandu	193
		N. Central Asia Standard Time	(GMT+06:00) Almaty, Novosibirsk	201
		Central Asia Standard Time	(GMT+06:00) Astana, Dhaka	195
		Sri Lanka Standard Time	(GMT+06:00) Sri Jayawardenepura	200
		Myanmar Standard Time	(GMT+06:30) Rangoon	203
		SE Asia Standard Time	(GMT+07:00) Bangkok, Hanoi, Jakarta	205
		North Asia Standard Time	(GMT+07:00) Krasnoyarsk	207
		China Standard Time	(GMT+08:00) Beijing, Chongqing, Hong Kong, Urumqi	210

Setting	Description			
		North Asia East Standard Time	(GMT+08:00) Irkutsk, Ulaan Bataar	227
		Singapore Standard Time	(GMT+08:00) Kuala Lumpur, Singapore	215
		W. Australia Standard Time	(GMT+08:00) Perth	225
		Taipei Standard Time	(GMT+08:00) Taipei	220
		Tokyo Standard Time	(GMT+09:00) Osaka, Sapporo, Tokyo	235
		Korea Standard Time	(GMT+09:00) Seoul	230
		Yakutsk Standard Time	(GMT+09:00) Yakutsk	240
		Cen. Australia Standard Time	(GMT+09:30) Adelaide	250
		AUS Central Standard Time	(GMT+09:30) Darwin	245
		E. Australia Standard Time	(GMT+10:00) Brisbane	260
		AUS Eastern Standard Time	(GMT+10:00) Canberra, Melbourne, Sydney	255
		West Pacific Standard Time	(GMT+10:00) Guam, Port Moresby	275
		Tasmania Standard Time	(GMT+10:00) Hobart	265
		Vladivostok Standard Time	(GMT+10:00) Vladivostok	270
		Central Pacific Standard Time	(GMT+11:00) Magadan, Solomon Is., New Caledonia	280
		New Zealand Standard Time	(GMT+12:00) Auckland, Wellington	290
		Fiji Standard Time	(GMT+12:00) Fiji, Kamchatka, Marshall Is.	285
		Tonga Standard Time	(GMT+13:00) Nuku'alofa	300
		Azores Standard Time	(GMT-01:00) Azores	80
		Cape Verde Standard Time	(GMT-01:00) Cape Verde Is.	83
		Mid-Atlantic Standard Time	(GMT-02:00) Mid-Atlantic	75
		Argentina Standard Time	(GMT-03:00) Buenos Aires	-2147483572

Setting	Description			
	E. South America Standard Time	(GMT-03:00) Brasilia		65
	SA Eastern Standard Time	(GMT-03:00) Buenos Aires, Georgetown		70
	Greenland Standard Time	(GMT-03:00) Greenland		73
	Montevideo Standard Time	(GMT-03:00) Montevideo		-2147483575
	Newfoundland Standard Time	(GMT-03:30) Newfoundland		60
	Atlantic Standard Time	(GMT-04:00) Atlantic Time (Canada)		50
	Central Brazilian Standard Time	(GMT-04:00) Manaus		-2147483576
	SA Western Standard Time	(GMT-04:00) Caracas, La Paz		55
	Pacific SA Standard Time	(GMT-04:00) Santiago		56
	Venezuela Standard Time	(GMT-04:30) Caracas		-2147483573
	SA Pacific Standard Time	(GMT-05:00) Bogota, Lima, Quito		45
	Eastern Standard Time	(GMT-05:00) Eastern Time (US and Canada)		35
	US Eastern Standard Time	(GMT-05:00) Indiana (East)		40
	Central America Standard Time	(GMT-06:00) Central America		33
	Central Standard Time	(GMT-06:00) Central Time (US, Canada)		20
	Central Standard Time (Mexico)	(GMT-06:00) Guadalajara, Mexico City, Monterrey		-2147483581
	Mexico Standard Time	(GMT-06:00) Guadalajara, Mexico City, Monterrey - Old		30
	Canada Central Standard Time	(GMT-06:00) Saskatchewan		25
	US Mountain Standard Time	(GMT-07:00) Arizona		15
	Mexico Standard Time 2	(GMT-07:00) Chihuahua, La Paz, Mazatlan - Old		13

Setting	Description		
	Mountain Standard Time	(GMT-07:00) Mountain Time (US, Canada)	10
	Mountain Standard Time (Mexico)	(GMT-07:00) Chihuahua, La Paz, Mazatlan	-2147483580
	Pacific Standard Time	(GMT-08:00) Pacific Time (US, Canada), Tijuana	4
	Pacific Standard Time (Mexico)	(GMT-08:00) Tijuana, Baja California	-2147483579
	Alaskan Standard Time	(GMT-09:00) Alaska	3
	Hawaiian Standard Time	(GMT-10:00) Hawaii	2
	Samoa Standard Time	(GMT-11:00) Midway Island, Samoa	1
	Dateline Standard Time	(GMT-12:00) International Date Line West	0
	If you leave this field blank, IBM® SPSS® Data Collection Interviewer Server will ignore time zones and calling times when selecting records for interviewers to call.		
Use interviewer qualifications	Whether or not to assign calls to interviewers based on interviewer qualifications. For example, if the participant's native language is Spanish, then assign the call to a Spanish speaking interviewer.		

The Parameters tab lists the current settings for the project.



You set these parameters at the start of the project, and can change them throughout the interviewing period to match the current requirements of the survey. For example, if it is the last day of the survey and you are running low on new participants, you might want to increase the maximum number of times that numbers may be called. You might also wish to reduce the elapse times for automatically set appointments so that numbers with callbacks become available for recall more quickly.

To Define Sample Management Parameters

- Select the Parameters tab.
- In Use these Time Zones, enter the time zones in which the participants for this project are located. If participants are located in more than one zone, separate the zone numbers with semicolons.
- Replace any of the default settings for other parameters by typing new values into the text boxes. When entering calling times, you can specify times in 12-hour (hh:mm am/pm) or 24-hour (hh:mm) format, but the next time you open the Phone Surveys the times will be shown in 24-hour format.
- If you want calls to be assigned to interviewers based on interviewers' qualifications, select Interviewer Qualifications.

Changing the Default Settings

If you find that for every new project you always change the settings on the Parameters tab to the same new values, you can instead change the default settings that Interviewer Server provides so that you no longer need to do this. For more information, see the topic Changing the Default Settings on p. 169.

Ordering Settings

The Ordering tab provides options for defining the order in which records are retrieved from each individual queue. For example, you may want to first dial records with a higher number of attempts when scanning the Recall queue.

The Ordering tab lists the current queue order settings.

Order/Weight. Defines the ordering of records, by field, in each queue.

- Select either Order or Weight.
- Select the appropriate field from the drop-down menu.
- Click Add Field Order/Weight... to open the Field Order dialog. The dialog allows you to define how record fields are ordered. For more information, see the topic Field Order Dialog on p. 140.

Order records by. The table displays the user-defined record order. Before performing any of the following tasks, you must first select a field row from the table.

- You can use the Up and Down buttons to reorder the **Order records by** list:

Figure 1-11

▶ Click the Edit record order by field button to open the Field Order dialog and edit existing field order definitions:

Figure 1-12

▶ Click the Delete field order button to delete existing field order definitions:

Figure 1-13

Prioritize recalls over fresh. Allows you to specify the frequency in which recalls to busy and other unanswered calls take priority over calls to new numbers. Specify a percentage to check the RECALL queue before the FRESH queue. For example, specifying a value of 25% would result in the RECALL queue being checked before the FRESH queue for one-in-four calls. The default value is 90%.

Note: Prioritizing recalls to less than 100% is the best option for reducing clumping. However, if there are no yet any FRESH records, randomizing the recall times can reduce the clumping of recalls after the first clump in a shift or daypart. The *multimode1_sample.mrs* script randomizes the recall time around the specified delay (using the specified **before a recall** time as the margin, and adjusting that recall time between 2 and 10 minutes as the **recall time after**). For example, when the busy delay is 30 minutes and the **before a recall** time is 10 minutes, numbers will be recalled between 20 and 40 minutes from their return time.

Order records with each queue by. The table displays the current field order for each queue. Before performing the following task, you must first select a queue row from the table.

▶ Click the Edit queue order button to open the Queue Order Edit dialog and edit the selected queue's field order

Figure 1-14

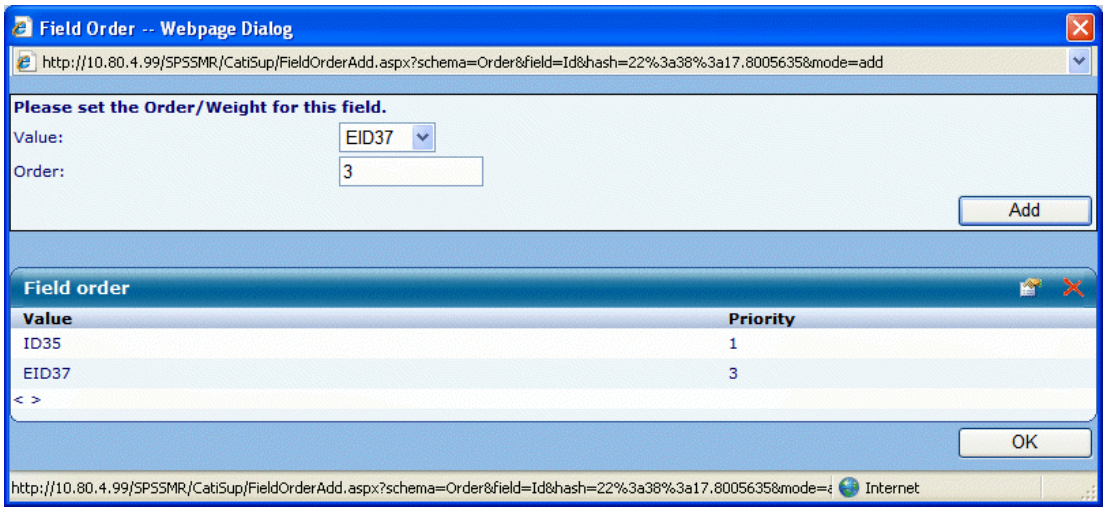
For more information, see the topic Queue Order Edit dialog on p. 141.

Notes

- When queue ordering and field/weight ordering are both specified, queue ordering is used to resolve parallel ordering.
- Records with values for which no order or weight are specified are retrieved last from the Appointment queue (records are not retrieved from any of the other queues).

Field Order Dialog

The Field Order dialog provides options for defining how record field values are ordered.



Value: The drop-down field lists all distinct values for the selected field, including null/empty. The message "There is no order/weight based on this field" displays when you select a distinct value for the first time. Select an appropriate value from the list.

Order\Weight: Enter a numeric value between 0 and 9999. The value you enter defines the order or weight priority for the selected value. The priority controls the record retrieval order for all queues.

Note: When you enter a value of 0, records that contain an order or weight value of 0 are the last to be retrieved from the selected queue, and are not retrieved from other queues.

- Click Add to save the defined value to the Field order table.

Field Order. The table lists all defined field order values and their associated priority. Before performing any of the following tasks, you must first select a field row from the table.

- Click the Edit field value order button to edit the selected field value's priority:

Figure 1-15

Click Update to save to edit or click Cancel to discard any change.

- Click the Delete field value order button to delete the selected field value:

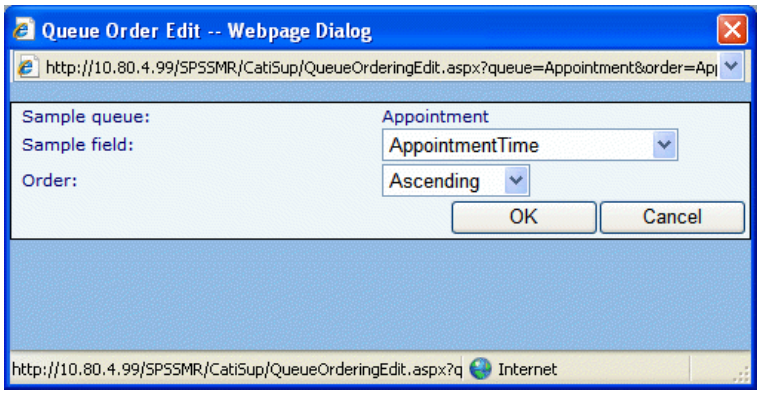
Figure 1-16

- Click OK to save your changes and return to the Ordering tab.

The Order records by table updates and displays your defined record field values.

Queue Order Edit dialog

The Queue Order Edit dialog provides options for defining which sample field will be used for ordering the selected queue's records.



Sample queue. This field is non-modifiable field displays the selected queue.

Sample field. The drop-down list provides all sample fields available to the selected queue. Select an appropriate field from the list.

Order. The order in which the selected sample field will be sorted. The drop-down list provides options for Ascending and Descending.

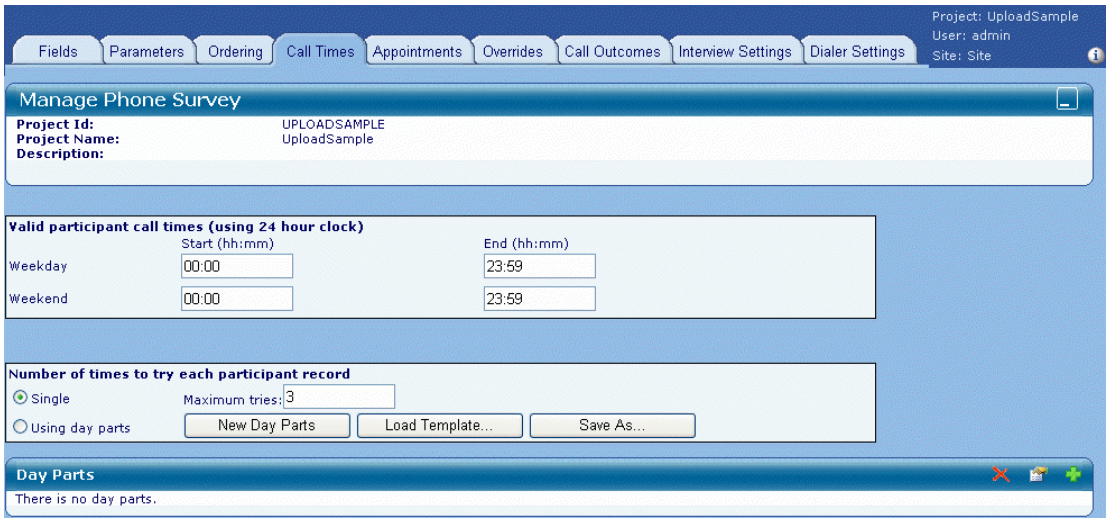
- Click OK to save your changes and return to the Ordering tab. Click Cancel to discard any changes and return to the Ordering tab.

The Order records within each queue by table updates and displays your changes.

Setting Up Call Time Parameters

The Call Times tab provides options for defining valid participant call times and for creating day parts for the current project. Day parts allow you to ensure that records are called at specific times of the day in order to increase the chance of success in reaching participants.

Note: If you have an existing project that uses pre-version 5.6 sample management scripts, you can setup day parts but they will not be recognized. The use of day parts requires version 5.6 or higher sample management scripts.



Weekday: Allows you to specify valid weekday participant call times:

- **Start (hh:mm).** The earliest time at which participants may be called on weekdays. Enter an appropriate start time.
- **End (hh:mm).** The latest time at which participants may be called on weekdays. Enter an appropriate end time.

Weekend: Allows you to specify valid weekend participant call times:

- **Start (hh:mm).** The earliest time at which participants may be called on weekends. Enter an appropriate start time.
- **End (hh:mm).** The latest time at which participants may be called on weekends. Enter an appropriate start time.

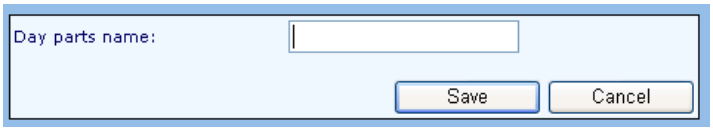
  By default, a weekend runs from 00:01 on Saturday to midnight on Sunday. The Sample Management script will handle situations where the project has participants in time zones with different definitions of weekdays and weekends.

When selected, the time parameters defined in the Valid participant call times section are used.

Maximum tries. The maximum number of times that a record may be called. The default is 3. If an Appointment is made, then an additional "Maximum Tries" tries can be made to connect the appointment.

Using day parts. When selected, you can utilize an existing day parts template that defines valid participant call times.

- Click New Day Parts to clear any currently defined day part settings in the Day Parts table.
- Click Load Template... to load an existing day parts template. Templates are stored in the Distributed Property Management (DPM).
- Click Save As... to save the current settings, listed in the Day Parts table, as a template in DPM. The Save As... dialog displays, allowing you to specify a template name.



Enter an appropriate template name and click Save. Otherwise click Cancel to return to the Call Times tab without saving.

Day Parts

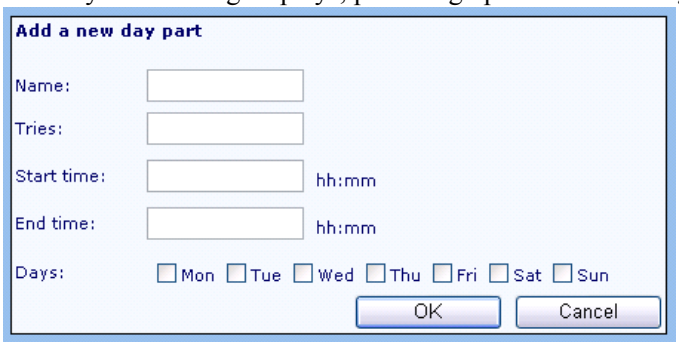
The Day Parts table lists all day parts that are currently defined for the project.

To Add a New Day Part

▶ Click the Add button to create a new day part definition:

Figure 1-17

The Day Parts dialog displays, providing options for defining a new day part.



Name: The day part name. Enter an appropriate name.

Tries: The maximum number of times that a record may be called. Enter an appropriate value.

Start time: The earliest time at which participants may be called. Enter the earliest call time.

End time: The latest time at which participants may be called. Enter the latest call time.

Days: Select the appropriate days of the week to contact participants.

▶ Click OK, after entering the desired day part parameters, to save the day part to the Day Parts table. Otherwise click Cancel to discard the new day part.

To Edit a Day Part

▶ Select an existing day part in the Day Parts table.

▶ Click the Edit day part button.

Figure 1-18

The Day Parts dialog displays with the selected day part parameters filled in.

- Apply the appropriate changes and click OK to update the day part. Otherwise click Cancel to discard the changes.

To Delete a Day Part

- Select an existing day part in the Day Parts table.
- Click the Delete day part button:

Figure 1-19

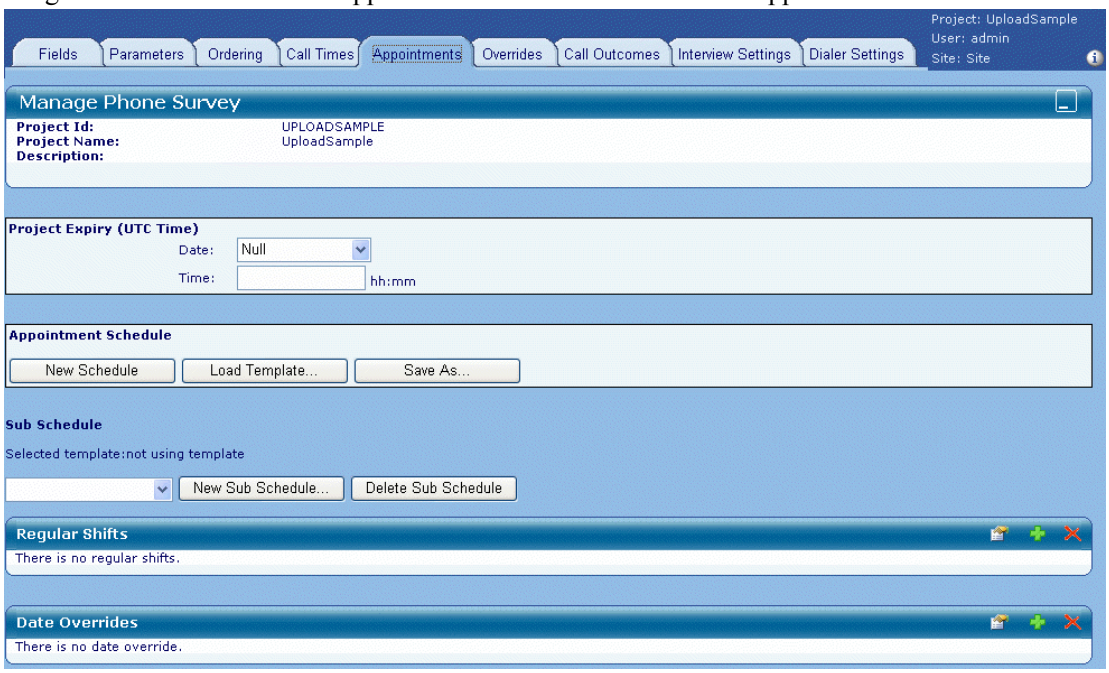
Setting Up Appointments

The Appointments tab provides options for defining a project expiry date and for creating appointment schedules for the current project.

An appointment schedule can be used to specify the interviewer shifts and holidays, ensuring that appointments can be made when interviewers are working. There can be multiple appointment schedules for a distributed site.

Appointment schedules may differ between projects and are therefore project specific. For example, interviewers may be scheduled to call business projects during the day and consumer projects in the evening.

Note: In order to use the Appointment tab options in the Phone Survey activity, you must first assign one time zone and one appointment schedule to at least one applicable user.



Project Expiry (UTC Time). Provides options for specifying a project expiration time.

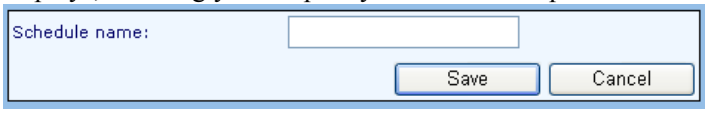
- **Date:** The project expiration date. You can manually enter a date, in the format mm/dd/yyyy, or you can click the down arrow to display a calendar and select a date.
- **Time:** The project expiration time. This indicates the exact time of day, for the selected date, that the project will expire. Enter an appropriate time in the 24-hour format hh:mm (for example 17:00 for 5:00 PM).

Appointment Schedule. Provides options for clearing the existing sub-schedules, loading schedule templates, and saving schedule templates.

▶ Click New Schedule to clear any currently defined sub-schedules.

▶ Click Load Template... to load an existing appointment schedule template. Templates are stored in the Distributed Property Management (DPM).

▶ Click Save As... to save the current schedule settings as a template in DPM. The Save As... dialog displays, allowing you to specify a schedule template name.

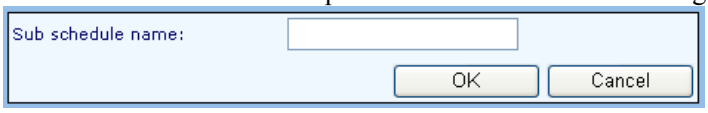


Enter an appropriate schedule template name and click Save. Otherwise click Cancel to return to the Appointments tab without saving.

Sub Schedule. Provides options for defining specific scheduling parameters. You can define specific shift parameters and date overrides for each sub-schedule. For example, the sub-schedule **Weekdays** could include the shift 08:00 - 17:00 for Mon;Tue;Wed;Thu;Fri while the sub-schedule **Weekends** could include the shift 12:00 - 19:00 for Sat;Sun.

To Create a New Sub-Schedule

▶ Click New Sub Schedule to open the New Sub Schedule dialog.



▶ Enter an appropriate sub schedule name and click OK to save the sub schedule. Otherwise click Cancel to discard the new sub-schedule.

To Delete a Sub-Schedule

▶ Select a sub-schedule from the drop-down field.

- Click Delete Sub Schedule. The selected sub-schedule is deleted and is no longer available from the drop-down field.

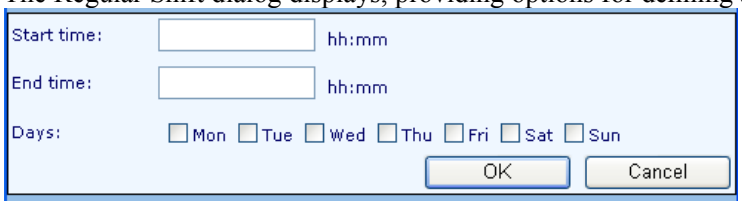
Regular Shifts. The table lists all shifts currently defined for the selected sub-schedule.

To Create New Shifts for a Sub-Schedule

- Select a sub-schedule from the drop-down field. If no sub-schedules exist, you must either create a new sub-schedule or load an appointment schedule template (both explained above).
- Click the Add button in the Regular Shifts table:

Figure 1-20

The Regular Shift dialog displays, providing options for defining a new shift.



Start time: The earliest time at which participants may be called. Enter the earliest call time.

End time: The latest time at which participants may be called. Enter the latest call time.

Days: Select the appropriate days of the week to contact participants.

- Click OK, after entering the desired shift parameters, to save the shift to the Regular Shifts table. Otherwise click Cancel to discard the new shift.

To Edit a Shift

- Select an existing shift in the Regular Shifts table.
- Click the Edit regular shift button.

Figure 1-21

The Regular Shift dialog displays with the preexisting shift parameters filled in.

- Apply the appropriate changes and click OK to update the shift. Otherwise click Cancel to discard the changes.

To Delete a Shift

- Select an existing shift in the Regular Shifts table.

▶ Click the Delete regular shift button:

Figure 1-22

Date overrides: The table lists all date override shifts currently defined for the selected sub-schedule. Date overrides allow you to specify specific dates and/or times where appointments are not allowed, as well as define specific dates and times that will override the shifts defined in the Regular Shifts table.

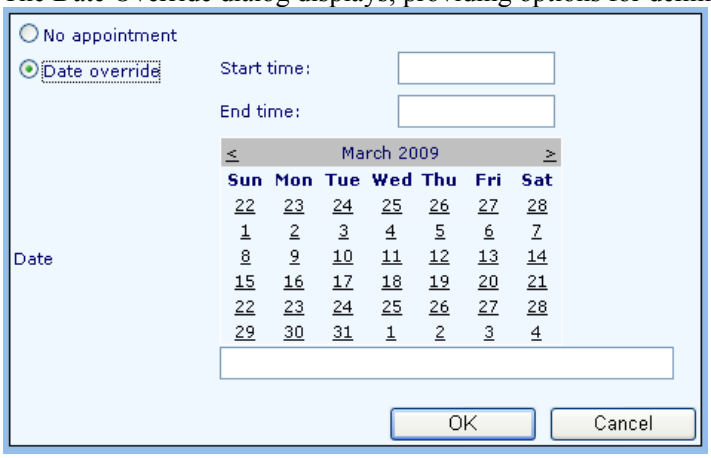
To Create New Date Override Shifts for a Sub-Schedule

▶ Select a sub-schedule from the drop-down field. If no sub-schedules exist, you must either create a new sub-schedule or load an appointment schedule template (both explained above).

▶ Click the Add button in the Date Overrides table:

Figure 1-23

The Date Override dialog displays, providing options for defining a new date override.


No appointment
Date override
Start time:
End time:
March 2009
Sun Mon Tue Wed Thu Fri Sat
22 23 24 25 26 27 28
1 2 3 4 5 6 7
8 9 10 11 12 13 14
15 16 17 18 19 20 21
22 23 24 25 26 27 28
29 30 31 1 2 3 4
Date
OK
Cancel

No appointment. Select this option when you want to define specific dates where no appointments are allowed.

Date override. Select this option when you want to define specific dates and times that override the shifts defined in the Regular Shifts table.

Start time: When No appointment is selected, the starting time at which participants may not be called. Enter the starting time. When Date override is selected, the earliest time at which participants may be called. Enter the earliest call time.

End time: When No appointment is selected, the end time at which participants may not be called. Enter the end time. When Date override is selected, the latest time at which participants may be called. Enter the latest call time.

Date. The calendar allows you to select specific No appointment or Date override dates. Select the appropriate date(s). All selected dates display in the field immediately beneath the calendar.

- Click OK, after entering the desired parameters, to save the date override to the Date Overrides table. Otherwise click Cancel to discard the new date override.

To Edit a Date Override

- Select an existing shift in the Date Overrides table.
- Click the Edit override date button.

Figure 1-24

The Date Override dialog displays with the preexisting override parameters filled in.

- Apply the appropriate changes and click OK to update the date override. Otherwise click Cancel to discard the changes.

To Delete a Date Override

- Select an existing shift in the Date Overrides table.
- Click the Delete override date button:

Figure 1-25

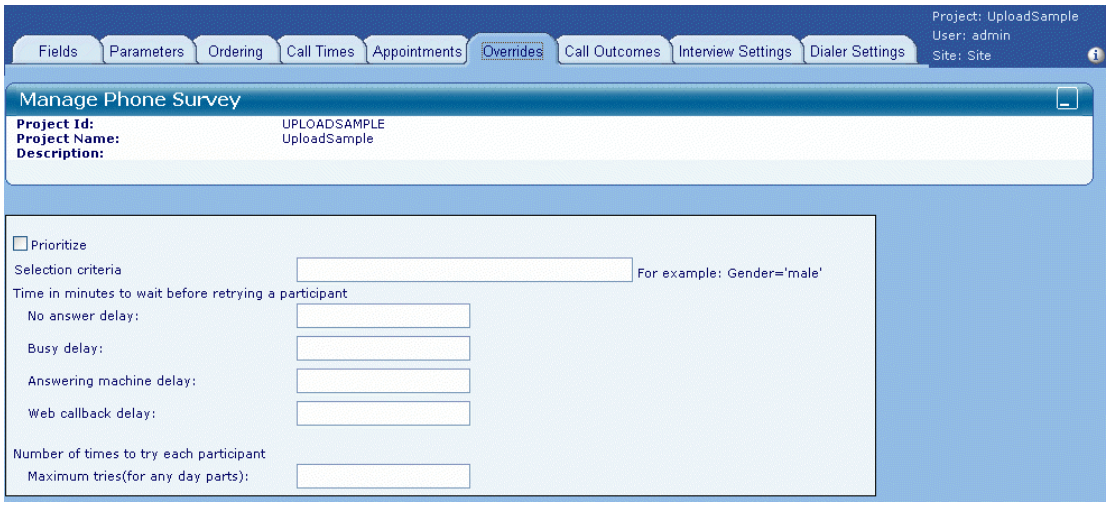
Setting Up Project Overrides

The Overrides tab provides options for changing the parameters that control dialing for a subset of records. All records, except those in the specified subset, continue to follow the base dialing rules.

Parameters that can be overridden are:

- The maximum number of attempts for a record.
- The call back delay for numbers that are not answered, busy, answered by an answering machine, or started on the web.

In addition, you can specify that a subset of records be identified as having a high priority. High priority records are generally called before other records. This feature could be used, for example, if you discover that the completion percentage for a particular subset of records (region for example) is particularly low. You could indicate that the subset has priority until the completion percentage reaches the average, at which point you could disable the override.



Prioritize. Select this option when you want the specify that the Selection criteria value be identified as having priority over other records. High priority records are generally called before other records

Selection criteria. Identifies the subset of records upon which the override parameters are based. Enter an appropriate criteria.

No answer delay. The callback delay (in minutes) for numbers that are not answered. Enter an appropriate value.

Busy delay. The callback delay (in minutes) for numbers that are busy. Enter an appropriate value.

Answering machine delay. The callback delay (in minutes) for numbers that are answered by an answering machine. Enter an appropriate value.

Web callback delay. The callback delay (in minutes) for surveys that are started on the web. Enter an appropriate value.

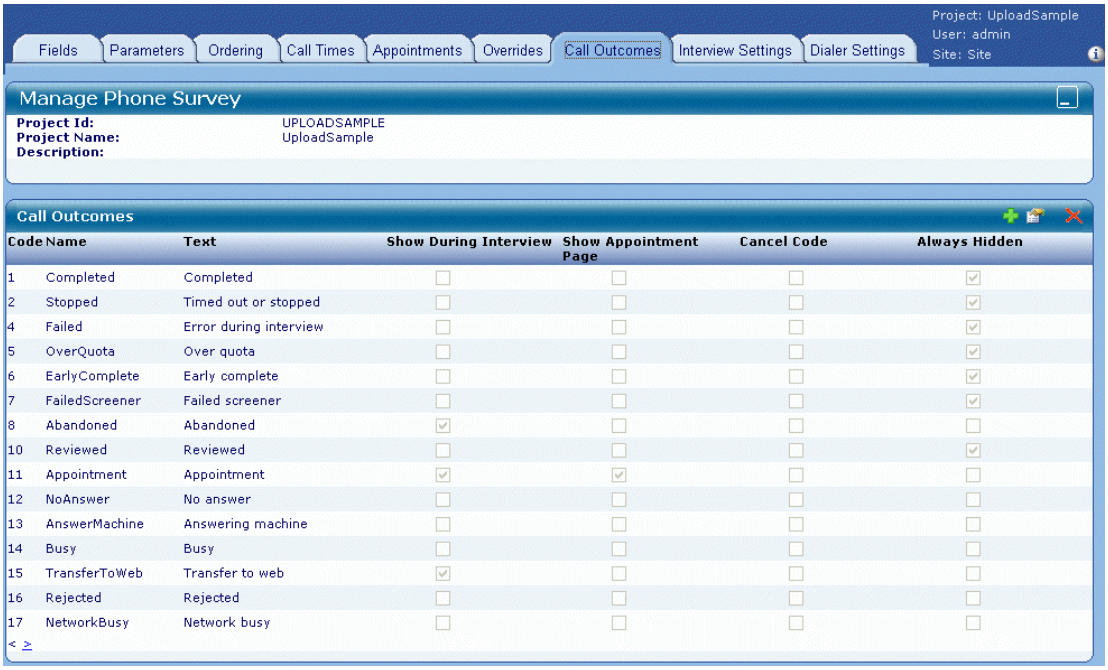
Maximum tries (for any day parts). Specifies the maximum number of callback attempts for each participant. Enter an appropriate value.

Setting Up the Call Outcome List

Interviewers working on a telephone interviewing project are provided with a list of call outcome codes from which they must select the outcome of each call that they make. IBM® SPSS® Data Collection Interviewer Server comes with a default list of call outcome codes that cover most requirements, so you should never need to build a call outcome list from scratch.

Note: For projects that use an autodialer, Interviewer Server automatically maps the status codes returned by the autodialer to one of the call outcomes.

The Call Outcomes tab lists the call outcome codes for the current project.



You can make the following changes to the list:

- Add new codes.
- Delete codes.
- Change code numbers, names, and texts.
- Select codes that must be available while interviews are in progress; for example, an **Abandoned Interview** code that can be selected if a participant starts an interview but then refuses to complete it.
- Specify which codes should prompt the interviewer to arrange a callback appointment with the participant. When interviewers select one of these outcomes they will prompted to enter a callback date and time.
- Specify which code should be used for canceled calls. Canceled calls occur when an interviewer is presented with a number to call manually, but clicks Cancel Contact rather than making the call. This returns the participant record to the Sample Management system with the appropriate code so that the record can be returned to the queue from which it was selected.
- Select codes that are always hidden from interviewers. Typically, these are call outcomes that are chosen automatically by Interviewer Server.

To Add a New Code

▶ Click the Add call outcome button in the Call Outcomes table:

Figure 1-26

Blank fields display near the bottom of the screen, allowing you to defining new call outcomes.

▶ In the Code field, type a unique number for the result code.

- In the Name field, type a name for the result code.
- In the Text field, type a description of when the result code should be used.

  This text is displayed in the call outcome list that the interviewer sees, so try to keep it short and simple if possible.
- Click Add.

  The code is added to the end of the list.

  Note: The Sample Management script must contain code to process all the call outcome codes used by a project. If you add codes, remember to liaise with whoever is responsible for the project's Sample Management script so that the script can be updated if this has not already been done. If a code has been defined for a project but is not mentioned in the Sample Management script, Interviewer Server will not be able to process calls returned with that outcome code.

To Change the Text

- Select the code you want to change and then click the Edit call outcome button.

Figure 1-27
Edit icon

This places the text field in edit mode.

- Update the text.
- Click Update.

To Delete a Code

- Select the code you want to delete and then click the Delete call outcome button.

Figure 1-28
Delete icon

To Display a Code when Interviews are Running

- Select the code you want to change and then click the Edit call outcome button.

Figure 1-29
Edit icon

- Select the Show During Interview check box.
- Click Update.

To Specify which Codes should Prompt for Appointment Details

- Select the code you want to change and then click the Edit call outcome button.

Figure 1-30
Edit icon

- Select the Show Appointment Page check box.
- Click Update.

To Specify which Code should be used for Canceled Contacts

- Select the code you want to change and then click the Edit call outcome button.

Figure 1-31
Edit icon

- Select the Cancel Code check box.
- Click Update.

To Hide a Code from Interviewers

- Select the code you want to change and then click the Edit call outcome button.

Figure 1-32
Edit icon

- Select the Always Hidden check box.
- Click Update.

Changing the Default Settings

If you find that for every new project you always change the settings on the Call Outcomes tab to the same new values, you can instead change the default settings that Interviewer Server provides so that you no longer need to do this. By editing the default settings, you can also do the following:

- Define additional default call outcomes so that you no longer need to add them to every project.
- Change the mapping of autodialer status codes (returned by the autodialer at the end of every call) to call outcomes. (This is not relevant if your projects don't use an autodialer.)

For more information, see the topic Changing the Default Settings on p. 169.

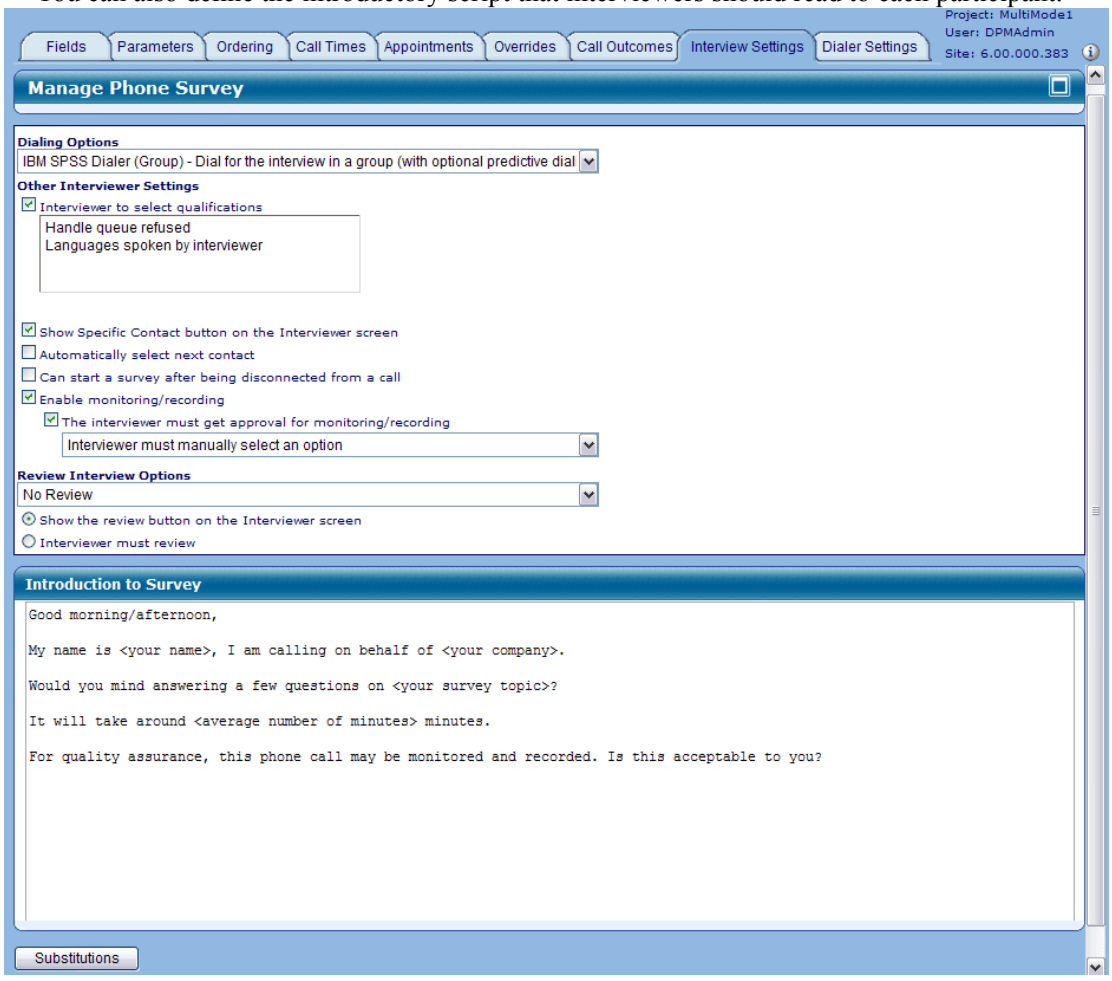
Interview Settings

On the Interview Settings tab, you can define the following:

- Whether an autodialer is used to dial phone numbers, or whether interviewers must dial numbers manually, or can use modems to dial numbers.
- Whether interviewers can retrieve specific participants.

- Whether the interviewing program should select an interviewer's next contact automatically, or whether interviewers should click a button to request their next contact.
- Whether interviewers can still start a survey after they have been disconnected from a call. This option is only available when an IBM® SPSS® Data Collection Dialer option is selected.
- Whether interviewers should be prompted to select their qualifications at the start of each session.
- Whether supervisors can monitor and record interviewers, and if so, whether interviewers must obtain consent for monitoring and recording from each participant.
- Whether interviewers must review completed interviews, and if so, whether the review starts automatically and whether it includes all questions or only text questions.

You can also define the introductory script that interviewers should read to each participant.


Project: MultiMode1
User: DPMAdmin
Site: 6.00.000.383
Fields
Parameters
Ordering
Call Times
Appointments
Overrides
Call Outcomes
Interview Settings
Dialer Settings
Manage Phone Survey
Dialing Options
IBM SPSS Dialer (Group) - Dial for the interview in a group (with optional predictive dial
Other Interviewer Settings
Interviewer to select qualifications
Handle queue refused
Languages spoken by interviewer
Show Specific Contact button on the Interviewer screen
Automatically select next contact
Can start a survey after being disconnected from a call
Enable monitoring/recording
The interviewer must get approval for monitoring/recording
Interviewer must manually select an option
Review Interview Options
No Review
Show the review button on the Interviewer screen
Interviewer must review
Introduction to Survey
Good morning/afternoon,
My name is <your name>, I am calling on behalf of <your company>.
Would you mind answering a few questions on <your survey topic>?
It will take around <average number of minutes> minutes.
For quality assurance, this phone call may be monitored and recorded. Is this acceptable to you?
Substitutions

You can also change the default values of these settings, so that your custom settings will be used whenever a new project is created. See "Changing the Default Settings" at the end of this topic.

Using an Autodialer to Dial Phone Numbers

To use an autodialer, select either of the following options from the Dialing Options drop-down list:

- IBM SPSS Dialer (Extension) – Power dial for the interviewer screen. In extension dialing, the autodialer dials participants only when interviewers click the Start Dialing button in the Phone Participants activity. This mode can result in longer wait times for interviewers, but is unlikely to result in silent calls.
- IBM SPSS Dialer (Group) – Dial for the interview in a group (with optional predictive dialing). In group/predictive dialing, the autodialer dials participants before interviewers are available to answer the connected calls. That is, the software predicts when interviewers will click the Start Dialing button. This mode can deliver the highest interviewer productivity, but might result in silent calls.

For more information about the difference between extension and group/predictive dialing, use the search function in the IBM® SPSS® Data Collection Developer Library documentation to search for the text "How Does Autodialing Work?" and in the search results open the topic with that title.

The option to use an autodialer is displayed only if one or more dialers have been added to the Dialer Administration activity in IBM® SPSS® Data Collection Interviewer Server Administration. However, if the position settings for a telephone interviewer station specify that the station can be used only for manual or modem dialing, the Start Dialing button will not be usable on that station.

Phone numbers used for autodialing must contain only the digits 0 to 9, * and # (optionally preceded by a plus (+) to present the international access code). In addition, the phone number can contain the visual separators SPACE, (,), . and -. Visual separators are not allowed before the first digit..

If you select this option, you might also need to change the settings on the Autodialer Settings tab. For more information about dialers and positions, see Dialer Administration.

Using a Modem to Dial Phone Numbers

To allow interviewers to use modems to dial phone numbers, select Modem – Show Dial Contact button on the Interviewer screen from the Dialing Options drop-down list. The Dial Contact button on the main screen of the Phone Participants activity will then be usable. When interviewers click that button, the phone number displayed in the main screen will be dialed automatically by the modem. Note that the modem option will work only for phone numbers that are formatted as follows:

+Country/RegionCode (Area/CityCode) SubscriberNumber

For example, 44 12 3456 7890 for a subscriber in the United Kingdom. In addition, a separate software installation is required on each telephone interviewer station that will use the modem option. For more information, search the *IBM® SPSS® Data Collection Interviewer Server Installation Instructions* for the topic "Things You Must Do on Local Machines". If a station has access to more than one modem, you can specify which one to use—for more information, use the search function in the Data Collection Developer Library documentation to search for the text "Settings for the Phone Participants Activity" and in the search results open the topic with that title.

If you select the option to use modems, the project cannot use an autodialer. Interviewers will still be able to dial numbers manually if they have access to a telephone keypad. The modem option works only on Microsoft Windows computers.

Dialing Phone Numbers Manually

To specify that interviewers must always dial phone numbers manually, select Manual – Interviewer dials numbers manually from the Dialing Options drop-down list. Interviewers should then manually dial the phone number displayed on the main screen of the Phone Participants activity.

If you select the option to dial phone numbers manually, the project cannot use an autodialer or modems.

Letting Interviewers Choose Their Qualifications

Interviewer qualifications control which sample records are allocated to each interviewer and are a good way of making the best use of your interviewers' skills. There are two ways of assigning qualifications to interviewers, which can be used together or separately. Administrators can set an interviewer's qualifications when they create Interviewer Server Administration accounts, or interviewers may select their own qualifications at the start of each interviewing session or during a session.

Depending on how your company uses qualifications, it may be appropriate for administrators to set some qualifications and for interviewers to be allowed to select others. For example, language or refusal-conversion qualifications could be set by administrators, while location qualifications that specify which region an interviewer should call could be set and changed by interviewers themselves.

If you want to allow interviewers to choose their own qualifications, select Interviewer to select qualifications on the Interview Settings tab. Then choose the qualifications that interviewers may select themselves. Selecting the option but no qualifications is the same as not selecting the option at all.

Note: Take care when choosing which qualifications interviewers may select, as it is possible to allow interviewers to select qualifications they do not have. For example, suppose the administrator has created Sam's account with a French language qualification. If you allow interviewers to set the language qualification, Sam will be presented with the full list of languages and will be able to choose any combination of languages from that list.

Retrieving a Specific Participant

To allow interviewers to retrieve specific participants from the sample database, select Show Specific Contact button on the Interview screen on the Interview Settings tab. The Specific Contact button on the main screen of the Phone Participants activity will then be usable. When interviewers click that button, they will be presented with a dialog box in which they can choose whether to retrieve their last contact or search for a contact. If they choose to search for a contact, they can select the field to search and specify the value to search for. The choice of fields to search is determined by the settings in the Show column on the Define Fields tab.

Selecting the Next Contact Automatically

When interviewers do not use an autodialer, they need to click the Next Contact button to request their next contact. If you would prefer that the next contact is retrieved automatically as soon as interviewers finish their current call, select Automatically select next contact on the Interview Settings tab. When interviewers need to take a break, they may click the Cancel Current Contact button. This takes them to the standard page where they may choose Next Contact, Specific Contact, or Exit as appropriate.

Interviewers working on projects with this option set will see a check box labeled "Auto contact selection" just above the list of call outcomes, so it is still possible for some interviewers to work in fully manual mode if you wish.

Some projects may use a combination of automated and modem or manual dialing. You can still select the "automatically select next contact" option for these projects, but interviewers who are using the dialer will need to cancel the "Auto contact selection" check box on the interviewing screen otherwise they will not be able to stop the dialer making calls when they reach the end of their shift or need to take a break.

Starting surveys after a disconnection

When an Dialer option is selected you can select the Can start a survey after being disconnected from a call option to specify that interviewers can start interviews even when respondents are disconnected from a call. This can be useful, for example, when the survey contains interviewer instructions at the end (allowing the interviewer to continue to the required instructions).

Interviewer Monitoring

The Interviewer Monitoring activity in Interviewer Server Administration can be used by call center supervisors to monitor and record interviews while they are in progress. Depending on your local laws or your organization's policy, you can configure monitoring for three different scenarios:

Scenario	To Specify This
Monitoring and recording are **not** allowed for this project	Clear the Enable monitoring/recording check box.
Monitoring and recording are **always** allowed for this project	Select the Enable monitoring/recording check box and clear the The interviewer must get approval for monitoring/recording check box.
Monitoring and recording are allowed **only** if the participant gives his or her consent	Select the Enable monitoring/recording and The interviewer must get approval for monitoring/recording check boxes.

If you have selected The interviewer must get approval for monitoring/recording, Yes and No options will appear on the main screen of the Phone Participants activity whenever interviewers retrieve a contact. As part of their introductory script, interviewers must ask each participant if they give their consent for monitoring and recording, and record the participant's answer by selecting either

Yes or No. The three options underneath The interviewer must get approval for monitoring/recording determine the default settings of the Yes and No options as described below:

Option	Description
Interviewer must manually select an option	The interviewer must always select either Yes or No.
Default setting is 'monitoring/recording prohibited'	The No option is selected by default. The interviewer can change the selection.
Default setting is 'monitoring/recording allowed'	The Yes option is selected by default. The interviewer can change the selection.

For more information, see Interviewer Monitoring.

Reviewing Interviews

You can choose whether interviewers can review the participant's responses after the interview has completed. In the "Review Interview Options" drop-down list, there are three options as follows:

Option	Description
No Review	The interviewer cannot review interviews.
Review Interview	The interviewer can review the whole interview.
Review Open-ends	The interviewer can review open-ended (text) responses only.

Note: The above setting does not affect the supervisor's ability to review interviews using the Review Interviews activity.

If you have selected either Review Interview or Review Open-ends, you can then choose between the following two radio buttons:

Option	Description
Show review button on interviewer screen	To start the review, the interviewer must click the Review Completed Interview button in the Phone Participants activity.
Interviewer must review	The review starts automatically when the interview finishes.

Defining the Introductory Script

When an autodialer connects a telephone interviewer to a participant (or, for projects that do not use an autodialer, when the interviewer requests a number to call), interviewers are provided with an introductory text that they can read to the participant to explain the reason for the call. Interviewer Server comes with a default text that is suitable for all surveys, but you can define your own text that is more specific to the current project.

Note: If the introductory text for most or all of your company's projects is always the same, you might wish to replace the default text that Interviewer Server provides with your organization's default text. See "Changing the Default Settings" below.

The Interview Settings tab displays the text that will be used for the current project, and provides an option to insert references to fields in the sample records or to the interviewer's name. These references will be replaced with the values from the current sample record and the name of the current interviewer when the text is displayed at the start of the interview.

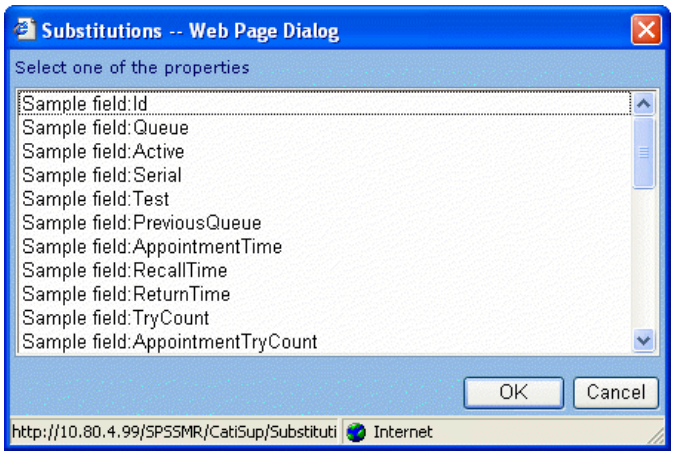
To Specify the Project's Introductory Text

- Replace the default text with the text you want interviewers to use.
- To insert a reference to a sample field or to the interviewer's name, click in the text at the point you want to make the insertion.

  A vertical bar cursor appears at that point.
- Click the Substitutions button.

  This displays the Substitutions dialog box.

Figure 1-33
Substitutions dialog box



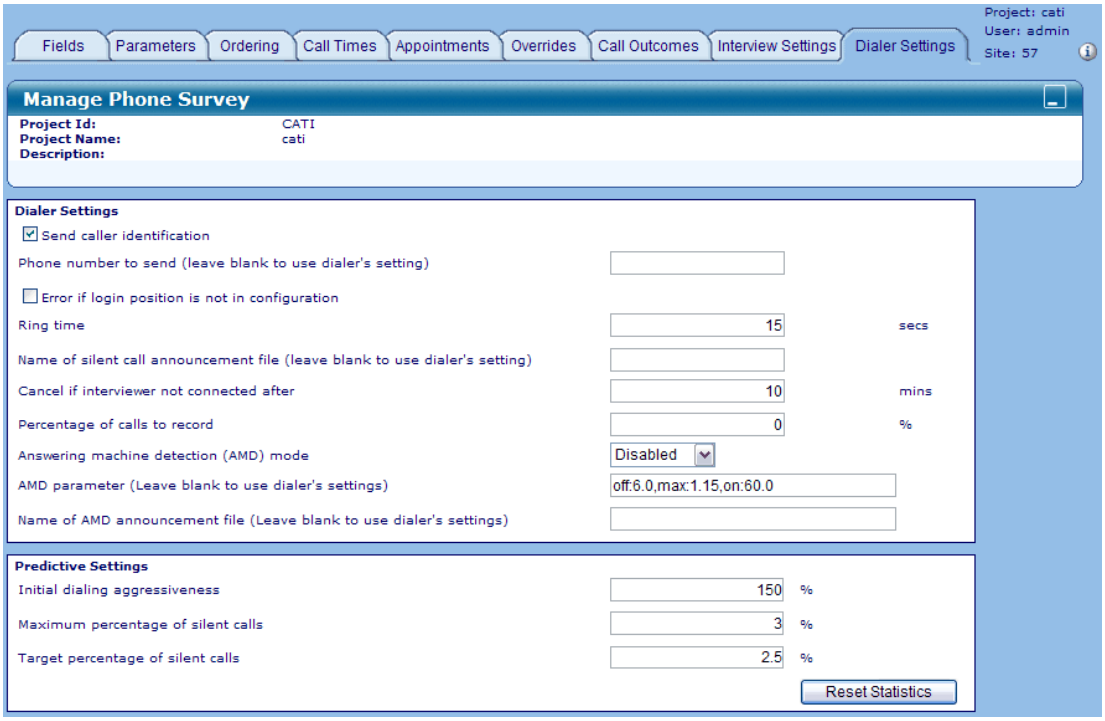
- Select the reference you want to insert and click OK.

Changing the Default Settings

If you find that for every new project you always change the settings on the Interview Settings tab to the same new values, you can instead change the default settings that Interviewer Server provides so that you no longer need to do this. For more information, see the topic Changing the Default Settings on p. 169.

Autodialer Settings

You use the Dialer Settings tab to define settings that relate to the use of an autodialer. You can ignore this tab if you have not selected the option on the Interview Settings tab to use an autodialer.


Project: cati
User: admin
Site: 57
Fields
Parameters
Ordering
Call Times
Appointments
Overrides
Call Outcomes
Interview Settings
Dialer Settings
Manage Phone Survey
Project Id: CATI
Project Name: cati
Description:
Dialer Settings
Send caller identification
Phone number to send (leave blank to use dialer's setting)
Error if login position is not in configuration
Ring time 15 secs
Name of silent call announcement file (leave blank to use dialer's setting)
Cancel if interviewer not connected after 10 mins
Percentage of calls to record 0 %
Answering machine detection (AMD) mode Disabled
AMD parameter (Leave blank to use dialer's settings) off:6.0,max:1.15,on:60.0
Name of AMD announcement file (Leave blank to use dialer's settings)
Predictive Settings
Initial dialing aggressiveness 150 %
Maximum percentage of silent calls 3 %
Target percentage of silent calls 2.5 %
Reset Statistics

You can change the default values of these settings, so that your custom settings will be used whenever a new project is created. See “Changing the Default Settings” at the end of this topic.

Dialer Settings

Send caller identification. Select this option to transmit the caller’s telephone number when the autodialer makes a call.

Phone number to send. By default, the caller’s telephone number is provided by a setting on the autodialer. To specify the caller’s telephone number, enter the number in this field. The phone number must contain only the digits 0 to 9 and the following characters: #, *, ., (,), -, and /. The presence of any other characters might cause caller identification to fail.

Error if login position is not in configuration. If one or more autodialers have been added to the Dialer Administration activity in IBM® SPSS® Data Collection Interviewer Server Administration, every telephone interviewer station (that is, any computer on which the Phone Participants activity will be used) must be assigned a position name. When a position name is entered in Phone Participants, IBM® SPSS® Data Collection Interviewer Server validates the name against those defined in the Dialer Administration activity.

For projects that use an autodialer, you can choose whether stations with unrecognized positions can be used to conduct interviews (that is, Phone Participants will still open). If so, manual dialing must be used on those stations. If you select this check box, Phone Participants will not open on a station with an unrecognized position and an error message will be displayed instead.

For more information about positions, see Dialer Administration.

Ring time. You can choose the minimum length of time that an unanswered phone call must ring before the autodialer terminates the call. To change the ring time, enter the number of seconds in this field. Make sure that you set a value that allows participants plenty of time to pick up the phone. In addition, your local laws might specify the minimum value that you must use.

Name of silent call announcement file. Silent calls can occur when an autodialer generates more calls than there are interviewers available to handle the calls. You can specify the name of a wave-sound (*.wav*) file that contains a message that will be played to the participant when a silent call occurs. To do so, enter the name of the *.wav* file in this field (for example, SilentCall.wav). The *.wav* file must be located in the autodialer's "audio" folder, the location of which is defined in the autodialer's *dialer.ini* file. You can also specify a *.wav* file that is located in a sub folder of the audio folder by including a relative path, for example, Projects\MyProject\SilentCall.wav.

Make sure that the name (and relative path, if specified) is correct, because Interviewer Server does not log an error if it cannot find the *.wav* file.

Cancel dialing if interviewer not connected after. When a telephone interviewer clicks the Start Dialing button on the main screen of the Phone Participants activity, the autodialer attempts to connect the interviewer to a participant. If the number of connected calls being generated by the autodialer is low compared with the number of interviewers available to handle the calls, there might be a delay of several minutes or more before the interviewer is connected.

You can choose the numbers of minutes that interviewers must wait to be connected to a participant before the autodialer cancels the connection attempt, allowing interviewers to leave their stations if they need to. To change the wait time, enter the number of minutes in this field.

Percentage of calls to record. You can choose the percentage of calls that the autodialer will record. Both individual questions and entire calls are recorded, and the recordings are saved as sound files in the autodialer's file system. To record calls, enter a whole number from 0 to 100 inclusive in this field. To record no calls or all calls, enter 0 or 100 respectively. If you enter any other value, that percentage of calls will be selected at random for recording, with the following exceptions:

- All subsequent calls to a participant whose previous call was recorded will also be recorded. This includes calls to keep an appointment or calls to complete an interview that was interrupted by a disconnection.
- Calls to participants retrieved by the Specific Contact button are recorded only if that participant was called previously and that previous call was recorded.

Note that when you change this setting, there might be a delay of up to a minute before the new value takes effect.

For more information, use the search function in the IBM® SPSS® Data Collection Developer Library documentation to search for the text "Recording Calls and Interviews" and in the search results open the topic with that title.

Answering machine detection settings

Answering machine detection (AMD) mode. Answering machine detection (AMD) can be useful when dialing residential numbers. It is based on the observation that human greetings are usually short, whereas answering machine messages are long. When an auto-dialed participant record is dialed, and the dialer detects that an answering machine picked up the call, the call is

automatically ended with the **Answering Machine** call outcome when the Interviewer Server is properly configured to support the feature.

Select the appropriate answering machine detection mode from the drop-down menu.

AMD parameter (leave blank to use dialer's settings). This field allows you to define specific AMD parameters. For more information, see the topic Configuring Answering Machine Detection on p. 163.

Name of AMD announcement file (leave blank to use dialer's settings). You can specify the name of a wave-sound (*.wav*) file that contains a message that will be played when answering machine detection occurs. To do so, enter the name of the *.wav* file in this field (for example, AMD.wav). The *.wav* file must be located in the autodialer's "audio" folder, the location of which is defined in the autodialer's *dialer.ini* file. You can also specify a *.wav* file that is located in a sub folder of the audio folder by including a relative path, for example, Projects\MyProject\AMD.wav.

Make sure that the name (and relative path, if specified) is correct, because Interviewer Server does not log an error if it cannot find the *.wav* file.

Predictive settings

The next three headings in this topic apply only when you have selected the Dialer (Group/Predictive) – Show Start Dialing button on the Interviewer screen option on the Interviews tab.

Initial dialing aggressiveness. You can set the initial "aggressiveness" of the autodialing system when it calculates the number of predictive calls to make. A higher aggressiveness setting can lead to less wait time for interviewers, but might result in more silent calls. To change the aggressiveness setting, enter a whole number between 1 and 1000 in this field.

To stop the autodialing system from dialing predictively, set Initial dialing aggressiveness to 0. In this mode, the autodialer dials participants only when interviewers click the Start Dialing button in the Phone Participants activity, which is unlikely to result in silent calls.

Maximum percentage of silent calls. You can specify the maximum percentage of silent calls that are allowed to occur in the 24 hour period since midnight. If the actual rate of silent calls approaches this value, the autodialing system reduces the current rate of predictive calls to ensure that the maximum percentage of silent calls is not exceeded. To change the maximum percentage, enter a decimal number in this field.

Target percentage of silent calls. You can specify the target percentage of silent calls that should occur at any time. The autodialing system attempts to keep the actual rate of silent calls at this value by continually adjusting the current rate of predictive calls. To change the target percentage, enter a decimal number in this field. The value must be less than the value of Maximum percentage of silent calls.

Reset Statistics. The Dialers tab in the Interviewer Monitoring activity shows the percentage of silent calls that are occurring for this project. To set that percentage figure to zero, click this button on the Dialer Settings tab.

Changing the default settings

If you find that for every new project you always change the settings on the Dialer Settings tab to the same new values, you can instead change the default settings that Interviewer Server provides so that you no longer need to do this. For more information, see the topic Changing the Default Settings on p. 169.

Configuring Answering Machine Detection

IBM® SPSS® Data Collection Dialer supports a simple answering machine detection (AMD) that can be useful when dialing residential numbers. It is based on the observation that human greetings are usually short, whereas answering machine messages are long. When an auto-dialed participant record is dialed, and Dialer detects that an answering machine picked up the call, the call is automatically ended with the **Answering Machine** call outcome when the IBM® SPSS® Data Collection Interviewer Server is properly configured to support the feature. Answering machine detection is currently configured through the DPM Explorer tool.

When answering machine filtering is in effect (amd=1), calls are only connected to an interviewer if the greeting is shorter than max. All other calls are dispositioned as answering machines and hung-up by the dialer. The dialer can optionally play a sound file (amfile) to the answering machine.

A DSP listens for the greeting. The DSP asserts voice when the received audio signal raises above a threshold (db, dBm, decibels relative to 1 mW power). Start-of-voice also starts timer max.

- If the DSP asserts end-of-voice before timer max expires, the call is connected to an interviewer. Since the interviewer does hear the respondent's greeting, the dialer plays a distinct beep WBeep that informs the interviewer to start talking.
- If timer max expires before end-of-voice is asserted, the dialer dispositions "**Answering machine**":
  - If no amfile is specified, the dialer simply hangs up the call.
  - Otherwise the dialer awaits end-of-voice before playing amfile.

The dialing algorithm proceeds in dialing further calls, without waiting for the playback to complete.

Notes

- These instruction assume that you have a working knowledge of DPM Explorer. Refer to the "DPM Explorer" topic in the *IBM® SPSS® Data Collection Developer Library* for information on working with the tool.
- Simple answering machine detection is not suitable when dialing business numbers with long greetings, mobile numbers with loud background noise, or persons with disabilities who may be slow in answering the phone.

1. Launch the DPM Explorer tool ([INSTALL_FOLDER]\IBM\SPSS\DataCollection\6\DDL\Code\Tools\VB.NET\DPM Explorer.Net\DPMExplorer.exe).

2. Create the following properties under:
   Site > Properties > DefaultCatiProjectProperties

   - **AmdMode**

     The answering machine detection mode. Possible values include: Disabled, Filtering, and Calibration.

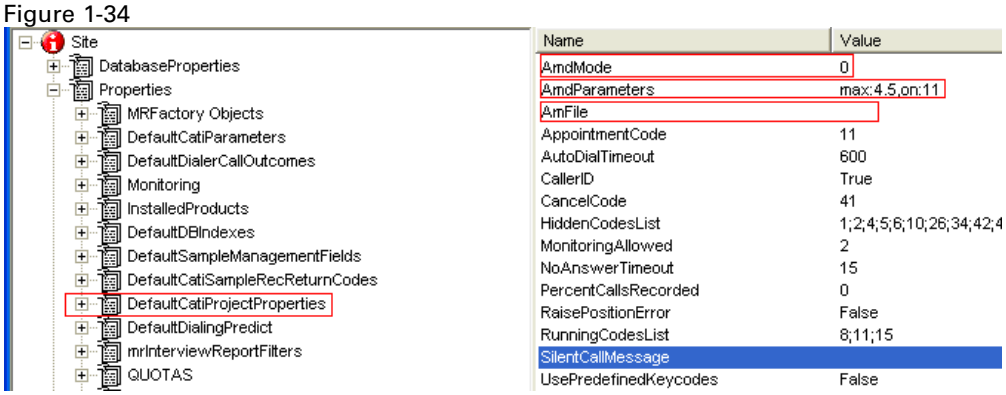
   - **AmdParameters**

     The answering machine detection parameters. All of the optional parameters (off, max, on, db, and so on) are encapsulated in this property. For example, max:4.5,on:11(using commas as the delimiter).

   - **AmFile**

     The name of the sound file to play for an answering machine, including the pathname (relative to **AudioDir** on the Dialer). You are not required to provide a value for this setting.

Figure 1-34



3. Exit DPM Explorer after defining appropriate values for the three settings.

The answering machine detection properties will take effect for all new projects. When an auto-dialed participant record is dialed, and Dialer detects that an answering machine picked up the call, the call is automatically ended with the **Answering Machine** call outcome.

Existing projects

For existing projects, the answering machine detection properties need to be added for each project:
Projects > <ProjectName> > mrInterview

False Positives

False positives are humans that were misinterpreted as answering machines, in which case the dialer hangs up the call, or plays the amfile. The main causes of false positives are:

- The human speaks a long greeting (> max). This typically happens when reaching a business number. If an amfile file is specified, the respondent will hear it.
- The human has loud background noise (permanently above the db threshold). This typically occurs with car phones. The playback of amfile starts when the AMD algorithm has waited for end-of-greeting for off seconds. However, this timer needs to be longer than the longest

AM greeting (~30 seconds), so it is unlikely that the respondent will wait long enough to hear amfile.

Humans can also be misinterpreted as "**No audio**". This occurs when:

- There is no audio connection (for example, because the battery in the respondent's phone is running low). After on seconds without start-of-voice, the dialer hangs up (call outcome: **No audio**).
- The human picks up the phone but does not start speaking immediately (for example, the respondent is busy, or due to a disability). After on seconds, the dialer hangs up.
- The greeting was spoken very softly (below the db threshold). Usually the respondent speaks up louder, but if the voice is not raised the dialer hangs up after on seconds. The dialer plays the amfile to "**No audio**" numbers unless the setting is disabled by option cp:-S (hangup immediately if silence).

Qualification Timers

Spoken words contains short gaps in the audio due to articulation. The dialer ignores gaps that are shorter than a qualification timer qoff; that is, the end-of-voice is asserted when qoff expires.

The dialer utilizes two qualification timers:

- qoff, for humans, determines when a call is connected to an interviewer. The settings should be short (<0.8 seconds); otherwise the respondent might become impatient and hang up. However, a qoff that is too short causes many false negatives because the timer fails to bridge well-articulated greetings.
- qam, for answering machines, determines when amfile is played. It should be long (>2 seconds), otherwise the playback might start before the answering machine is ready to record it.

Calibration Mode

Calibration mode is a means to determine the optimum AMD parameters. In calibration mode, all calls are connected to interviewers (just as when AMD is disabled). The AMD measures the duration of the respondent's initial greeting. During this phase, the interviewer can hear the respondent, but cannot talk. When the AMD measurement is finished (end-of-voice), the interviewer hears a short beep (WBeep) and audio is connected in both directions.

In cases of long initial silence (longer than coff seconds) or persistent voice (longer than con seconds), the AMD measurement is aborted and audio is connected in both directions. This makes it possible to try out different values of db and qoff without losing the contacts.

The greet time measured by AMD is sent to the application and recorded in *call.log*. To determine the reliability of a given max setting for the AMD call dispositions, make a frequency distribution of the call outcomes according to the following table:

Interviewer's Disposition	AMD Reported greet Value

	greet = 0	greet ≤max	greet > max
Human (proceed, appointment, refusal, and so on)	False positive? [1]	Correct (human)	False positive
Answering machine	Semi-correct (AM) [2]	False negative	Correct (AM)

[1]greet=0 can be an artifact from using a too small coff value, such that the AMD measurement was abandoned before the greeting started.

[2]greet=0 starts playback of amfile, but possibly too early, before the answering machine is ready to record it.

Summary of AMD Modes and Parameters

Syntax: *mode , param1 : value , param2 : value2...*

Example: amd = 1,qoff:0.40,log:1

Mode	Meaning	Description
0	Disabled	No AMD analysis (but the Call Progress parameter cp is used).
1	Filtering	Only "live" calls are through-connected to an interviewer; otherwise the amfile is played.
2	Calibration	Calls are connected in listen-only mode during AMD analysis; the result is reported in greet.

Name	Default	Unit	Description	Action if exceeded	Applies to
off	6.0	seconds	Max silence at start of call	Hangup QSAMP_NO_AUDIO	Filtering
coff	4.5	seconds	Max silence at start of call	Connect two-way audio	Calibration
max	1.15	seconds	Max greeting from human [1]	Hangup QSAMP_ANSMC	Filtering
on	60.0	seconds	Max greeting from AM	Play amfile to AM	Filtering
con	3.0	seconds	Max greeting measured	Connect two-way audio	Calibration
qoff	0.35	seconds	Qualification timer for end of voice [2]	Connect QSAMP_CONNECTED	Both
qam	2.9	seconds	Qualification timer for starting playback	Play amfile	Filtering
db	-34.0	dBm	Silence threshold (range -46 to -34 dBm) [3]	Start max timer	Both
log	0	0 or 1	If =1, report greet and silence times (milliseconds) in *call.log*[4]		Both
cp			Override dialer.ini call progress analysis completion criteria CpComplete[5]		All

[1]max recommended range from 0.9 seconds (aggressive, many false positives) to 2.1 seconds (conservative, many false negatives).
[2]qoff recommended range from 0.3 seconds (many false negatives) to 1.1 (detects most AM, but connects humans very slowly to an interviewer).
[3]db should be high (insensitive) to avoid detecting people in noisy environments as answering machines (false positives).
[4]log times are measured on the dialer PC and can differ slightly from the greet times measured by the DSP.
[4]log times are measured on the dialer PC and can differ slightly from the greet times measured by the DSP.
[5]cp should normally not be applied for AMD; the only relevant parameter is cp:-S. If persistent silence is detected, hangup call without playing amfile.

AMD Parameter for Call Progress Analysis

The cp parameter specifies the actions to take when detecting call progress tones, overriding the default call progress analysis completion criteria CpComplete in the *dialer.ini* file. Application areas:

- Calling countries with non-standard ringback or "number unobtainable" tones.
- Calling networks that announce tariff information at the start of the call.
- Calling subscribers with personalized ringback tones (music or announcements).
- In order to achieve special effects, such as recording of in-band announcements.

The table below lists the different call progress events. Each event is identified by a letter; pre-CONNECT events in lower case, post-CONNECT in upper case. Each letter or group of letters is preceded by an action identifier (see the legend below the table). The post-CONNECT events are only detected in AMD filtering or calibration mode (amd=1 or amd=2).

Syntax: cp:*actionID event... [actionID event...] ...*

Default: cp:-b-c-d-f!r:t:v-B-C+D-F-T

Example: cp:=vea Ignore pre-CONNECT voice events (for instance, personalized ringback tones).

Example: cp:*t*v Record recfile when detecting tritone or start-of-voice (until stopped by noansw timeout).

Example: cp:+v Connect to extension when detecting start-of-voice.

Call Progress Event		Default		Call Outcome if Action is '-' or ':'		
		pre	post			
		con	nect	Dialer	Interviewer Phone	IBM® SPSS® Quancept™
d	Dial tone (steady tone for >3 s)	-d	+D	QSAMP_BADNUMBER	QSAMP_BUSY	d_badsyn
r	Ringback pulse (duration 1.5 - 3 s)	!r	=R	QSAMP_RINGING	n/a [6]	d_error [7]

q	End of ringback (no pulse for >8 s)	=q	=Q	QSAMP_NOANSW	coNoAnswer	d_na
b	Busy tone (cadence or "precise" tone [8])	-b	-B	QSAMP_BUSY	coBusy	d_busy
c	Congested / reorder tone (cadence)	-c	-C	QSAMP_FASTBUSY	coFastBusy	d_sitout
t	Tritone (Special Information Tone)	:t	-T	QSAMP_TRITONE	coTriTone	d_sitout
f	Fax/modem tone	-f	-F	QSAMP_MODEM	coFaxModem	d_modem
v	Start of voice (diffuse energy above db dBm)	:v	=V	QSAMP_ANNOUNCEMT	coAnnouncement	d_sitout
e	End of voice (for qoff seconds)	=e	=E	QSAMP_ANNOUNCEMT	coAnnouncement	d_sitout
a	Voice for more than max seconds	=a	=A	QSAMP_ANNOUNCEMT	coAnnouncement	d_sitout
s	Silence; no voice for off seconds [9]	n/a	=S	QSAMP_ANNOUNCEMT	coNoAudio	d_error [7]
w	Call waiting, ignore voice events [10]	=w	=W	QSAMP_BUSY	coBusy	d_busy

Action identifiers:

- `-` Hangup immediately.
- `:` Hangup if no CONNECT is received within two seconds.
- `+` Connect to extension even if no CONNECT was received.
- `*` Start recording (for use with recfile option beg:3).
- `!` Start noansw timer.
- `^` Stop CP analysis (ends AMD, connecting the extension).
- `=` No action (can be used to override default actions).

[6] Call outcome QSAMP_RINGING does not map to a supported CallOutcome in Interviewer Phone 5.6.
[7] Call outcomes can be mapped to other tipcode values in section [qsamp map] in the *qts-sms.ini* file.
[8] "Precise" tone meaning the 480 + 620 Hz busy tone of the North American Precise Audible Tones Plan.
[9] Condition S (silence) is only generated in AMD filtering or calibration mode (amd=1 or amd=2).
[10] Condition W (waiting) is generated by signaling events with the action announcemt in *causes.cfg*.

Controlling Access to Phone Survey's Features

You can control access to the various tabs in Phone Surveys by assigning users or roles to Phone Survey's activity features. The activity features that you can use are shown in the following table.

Tab Name	To View this tab	To Edit this tab	To Delete records from this tab
Fields	Can view fields	Can edit fields	Not applicable
Parameters	Can view parameters	Can edit parameters	Not applicable
Call Outcomes	Can view call outcomes	Can edit call outcomes	Can delete call outcomes

Tab Name	To View this tab	To Edit this tab	To Delete records from this tab
Interview Settings	Can view interview settings	Can edit interview settings	Not applicable
Dialer Settings	Can view dialer settings	Can edit dialer settings	Not applicable

By default, the CATISupervisor role is assigned to all the activity features shown apart from "Can edit fields", "Can edit call outcomes", and "Can delete call outcomes".

For more information about activity features, search the *IBM® SPSS® Data Collection Interviewer Server Administration User's Guide* for the topic "Assigning Users or Roles to Activity Features".

Changing the Default Settings

When you create a new project, the settings in Phone Surveys' tabs are populated with default settings provided by IBM® SPSS® Data Collection Interviewer Server. You can change Interviewer Server's default settings so that when you create a new project, Phone Surveys' tabs will be populated with the values that you defined.

Depending on the tab, the default settings for that tab are stored in different locations, as shown in the following table:

Tab Name	Location of Default Settings
Fields	In the *catifields_default.mdd* file
Parameters	In DPM's (Distributed Property Management's) site properties
Call Outcomes	In DPM's site properties
Interview Settings	In the *catifields_default.mdd* file and in DPM's site properties
Dialer Settings	In DPM's site properties

For instructions on how to change the default settings, click the appropriate topic in the following table:

To carry out one of these tasks	See this topic
• Changing the settings in *catifields_default.mdd* • Adding a field to *catifields_default.mdd*	Editing catifields_default.mdd
• Changing the settings in DPM's site properties • Adding a call outcome to DPM's site properties • Changing the mapping of autodialer status codes to call outcomes	Editing DPM's Site Properties

Editing catifields_default.mdd

This topic describes how to carry out the following tasks:

- **Changing the settings in catifields_default.mdd**
- **Adding a field to catifields_default.mdd**

Changing the Settings in catifields_default.mdd

To edit the *catifields_default.mdd* file, you will need to use MDM Explorer as follows.

- In Windows Explorer, run *MDM Explorer.exe*, which by default is located in the following directory:
  - x86 32-bit installations:
    [INSTALL_FOLDER]\IBM\SPSS\DataCollection\6\DDL\Code\Tools\VB6\MDM Explorer
  - x64 64-bit installations:
    [INSTALL_FOLDER]\IBM\SPSS\DataCollection\6\DDL\Code\Tools\VB.NET\MDM Explorer
- From the File menu, choose Open Document.
- Open *catifields_default.mdd*, which by default is located in folder *FMRoot\Shared\Cati*.
- In the left pane, click the MDM collection that contains the property that you want to change (see the table below).
- In the upper-right pane, double click the MDM property that you want to change (see the table below). This opens a dialog box.
- In the dialog box, change the value as required and click OK.
- When you have finished, choose Exit from the File menu, and when prompted, save the file to its original location.

Tab Name	Tab Setting	Corresponding MDM Collection	Corresponding MDM Property	Valid Values
Fields	Label	Expand the Fields collection and in the left pane click the field required	Label	A string that describes the field.
Fields	Required, Show, Can Edit During Survey, Can Tabulate	In the left pane, expand the Fields collection, then expand the node for the desired field, and then click the Custom Properties collection	The property names are very similar to the setting names, with the exception of the Editable property, which corresponds to the Can Edit During Survey setting	True or False.

Tab Name	Tab Setting	Corresponding MDM Collection	Corresponding MDM Property	Valid Values
Interview Settings	Dialing Options	Custom Properties	DialerType	0 for "Manual – Interviewer dials numbers manually", 1 for "Modem – Show Dial Contact button on the Interviewer screen", 2 for "Dialer (Extension) – Show Start Dialing button on the Interviewer screen", or 3 for "Dialer (Group/Predictive) – Show Start Dialing button on the Interviewer screen". The installation value is 0.
Interview Settings	Show Specific Contact button on the Interviewer screen	Custom Properties	ShowSpecificContactButton	True or False. The installation value is True.
Interview Settings	Interviewer must manually select an option / Default setting is 'monitoring/recording prohibited' / Default setting is 'monitoring/recording allowed'	Custom Properties	MonitoringApprovalDefaultOption	0 for "Interviewer must manually select an option", 1 for "Default setting is 'monitoring/recording prohibited'", or 2 for "Default setting is 'monitoring/recording allowed'". The installation value is 0.
Interview Settings	Review interview options	Custom Properties	ReviewInterviewOption	0 for "No Review", 1 for "Review Interview", or 2 for "Review Open-ends". The installation value is 0.
Interview Settings	Show review button on interviewer screen / Interviewer must review	Custom Properties	ShowReviewInterviewOption	0 for "Show review button on interviewer screen" or 1 for "Interviewer must review". The installation value is 0.
Interview Settings	Introduction to Survey	Labels	Text	A string, defining the introductory script.

Adding a Field to catifields_default.mdd

- Start MDM Explorer and open *catifields_default.mdd* as described in "Changing the Settings in catifields_default.mdd" above.
- In MDM Explorer's left pane, click the Fields collection.
- From the Methods menu, choose Add Question.

  This opens the "Add MDM Object" dialog box.
- Enter values for Name, Label, and DataType. Typically, DataType should be one of mtText, mtLong, or mtDate. Then click OK.
- In the left pane, expand the node for the field you have just created and click the Custom Properties collection.
- From the Methods menu, choose Add Custom Property. This opens a dialog box.
- Set the values in the dialog box as follows, and then click OK.

Setting	Value
Name	Required
Value	True or False
Type	Boolean
Context	Analysis

  This adds a custom property called Required to the field you created.
- Repeat the last two steps three times, to add the Show, Editable, and CanTabulate custom properties to the field you created.
- When you have finished, choose Exit from the File menu, and when prompted, save the file to its original location.

Editing DPM's Site Properties

This topic describes how to carry out the following tasks:

- **Changing the settings in DPM's site properties**
- **Adding a call outcome to DPM's site properties**
- **Changing the mapping of autodialer status codes to call outcomes**

Changing the Settings in DPM's Site Properties

To change settings in DPM, you need to use DPM Explorer as follows:

- In Windows Explorer, run *DPMExplorer.exe*, which by default is located in folder *[INSTALL_FOLDER]\IBM\SPSS\DataCollection\6\DDL\Code\Tools\VB.NET\DPM Explorer.Net*.
- In the left pane, expand the top-level node (the site name) and then expand the Properties node.

- In the left pane, click the DPM collection that contains the property that you want to change (see the table below).
- In the upper-right pane, click the DPM property that you want to change (see the table below).
- In the lower-right pane, change the value as required and click the Apply button, which is in the lower-right corner.

Tab Name	Tab Setting	Corresponding DPM Collection	Corresponding DPM Property	Valid Values
Parameters	No preference for appointments / Give preference to the interviewer who arranged the appointment	DefaultCatiParameters	AppointmentPreferArranger	1 to select "Give preference to the interviewer who arranged the appointment" or 0 to select "No preference for appointments". If the AppointmentPreferArranger property doesn't exist, then "No preference for appointments" is implied.
Parameters	Before an appointment, by any interviewer *and* Before an appointment, by the arranger only (both settings are controlled by the AppointmentMarginBefore property)	DefaultCatiParameters	AppointmentMarginBefore	The number of minutes. The installation value is 5.
Parameters	After an appointment, by any interviewer	DefaultCatiParameters	AppointmentMarginAfter	The number of minutes. The installation value is 5. This setting applies only if the AppointmentPreferArranger property above is set to 1.
Parameters	Before a recall	DefaultCatiParameters	RecallMarginBefore	The number of minutes. The installation value is 10.

Tab Name	Tab Setting	Corresponding DPM Collection	Corresponding DPM Property	Valid Values
Parameters	Any other setting on the Parameters tab not listed above	DefaultCatiParameters	The DPM property names are very similar to the tab setting names.	In general, the valid values for a property are the same as the values that can be entered on the Parameters tab for the corresponding setting. However, for the PrioritizeRecalls and UseInterviewerQualifications properties, enter 1 to select the check box on the Parameters tab or 0 to clear the check box.
Call Outcomes	"Text"	Expand the DefaultCatiSample–RecReturnCodes collection and in the left pane click the call outcome required	Text	A string value that describes the call outcome.
Call Outcomes	Show When Interview Running	DefaultCatiProjectProperties	PartialCodesList	One or more call outcome code numbers, separated by semicolons.
Call Outcomes	Show Appointment Page	DefaultCatiProjectProperties	AppointmentCode	One or more call outcome code numbers, separated by semicolons.
Call Outcomes	Cancel Code	DefaultCatiProjectProperties	CancelCode	A call outcome code number.
Call Outcomes	Confirm Hangup Outcomes	DefaultCatiProjectProperties	ConfirmHangupOutcomes	One or more call outcome code numbers, separated by semicolons. The default value is 15. This property is only employed when used with IBM® SPSS® Data Collection Dialer. Interviewers will need to exit and reenter the Phone participants activity in order to pick up changes to this property.

Tab Name	Tab Setting	Corresponding DPM Collection	Corresponding DPM Property	Valid Values
Call Outcomes	Always Hidden	DefaultCatiProjectProperties	HiddenCodesList	One or more call outcome code numbers, separated by semicolons.
Interview Settings	Enable monitoring/recording *and* The interviewer must get approval for monitoring/recording (both settings are controlled by the MonitoringAllowed property)	DefaultCatiProjectProperties	MonitoringAllowed	0 to clear "Enable monitoring/recording", 1 to select "Enable monitoring/recording" and clear "The interviewer must get approval for monitoring/recording", or 2 to select both "Enable monitoring/recording" and "The interviewer must get approval for monitoring/recording". The installation value is 2.
Dialer Settings	Send caller identification *and* Phone number to send (both settings are controlled by the CallerID property)	DefaultCatiProjectProperties	CallerID	Set the value to False to clear "Send caller identification", or True to select "Send caller identification" and clear "Phone number to send", or set the value to a string that specifies the value of "Phone number to send". If specified, the string must contain only the digits 0 to 9 and the following characters: #, *, ., (,), -, and /. The installation value is True.
Dialer Settings	Error if login position is not in configuration	DefaultCatiProjectProperties	RejectPositionError	True or False. The installation value is False.
Dialer Settings	Ring time	DefaultCatiProjectProperties	NoAnswerTimeout	The number of seconds. The installation value is 15. Do not set a value lower than that for MinimumRingTime below.

Tab Name	Tab Setting	Corresponding DPM Collection	Corresponding DPM Property	Valid Values
Dialer Settings	(There is no corresponding setting in Phone Surveys, but the MinimumRingTime property defines the minimum value that can be specified in the Ring time setting)	Properties	MinimumRingTime	The minimum value that can be set in Ring time. The installation value is 0.
Dialer Settings	Name of silent call announcement file	DefaultCatiProjectProperties	SilentCallAudioFile	The name of a *.wav* file, including the full path. The installation value is an empty string.
Dialer Settings	The number of seconds that auto-dialing should continue trying to dial numbers for an Interviewer	DefaultCatiProjectProperties	AutoDialTimeout	The number of seconds. The installation value is 600 (10 minutes).
Dialer Settings	Percentage of calls to record	DefaultCatiProjectProperties	PercentCallsRecorded	A whole number between 0 and 100. The installation value is 0 (that is, no calls are recorded).
Dialer Settings	Dialing aggressiveness, Maximum percentage of silent calls, Target percentage of silent calls	These three settings do not have corresponding DPM site properties		

Adding a Call Outcome to DPM's Site Properties

- ▶ Start DPM Explorer and expand the site's Properties node as described in "Changing the Settings in DPM's Site Properties" above.
- ▶ In DPM Explorer's left pane, click the DefaultCatiSampleRecReturnCodes collection.
- ▶ From the Add menu, choose Property Collection. This opens a dialog box.
- ▶ In the dialog box, enter a name for the call outcome and click OK.
- ▶ In the left pane, click the collection you have just created.
- ▶ From the Add menu, choose Property. This opens a dialog box.
- ▶ In Name, type Code. In Value, type a unique code number for the call outcome. Then click OK.
- ▶ Repeat the last three steps, but in Name, type Text, and in Value, enter a short description of the call outcome.

Changing the Mapping of Autodialer Status Codes to Call Outcomes

When a project uses an autodialer, the autodialer returns a status code at the end of each call attempt to indicate whether a successful call was generated. IBM® SPSS® Data Collection Interviewer Server then maps the status code to one of the call outcomes for the project. For example, if the autodialer returns the status code *Congested* (meaning that it was unable to make the call because the telephone network is congested), Interviewer Server maps that code to the NetworkBusy call outcome and as a result the participant record is assigned to the RECALL queue by the sample management script.

You can change the default mapping of autodialer status codes to call outcomes as follows:

- Start DPM Explorer and expand the site's Properties node as described in "Changing the Settings in DPM's Site Properties" above.
- In the left pane, expand the DefaultDialerCallOutcomes collection and click the autodialer status code whose mapping you want to change.
- In the upper right pane, double click ReturnCode.
- In the lower right pane, change the value to the name of the call outcome that should be mapped to this autodialer status code.
- Click the Apply button, which is in the lower-right corner.

Phone Participants

You use Phone Participants to conduct interviews by telephone.

Each interview has a **dialing phase**. The actions you take in this phase depend on whether the IBM® SPSS® Data Collection Interviewer Server project you are working on uses an autodialer:

- If an autodialer is used, you click a button to ask the autodialer to connect you to a participant. For more information, see the topic Using an autodialer to make calls on p. 185.
- If an autodialer is not used, you request a number to call and then manually dial the number you have been given. Alternatively, you might be able to use a modem to dial the number automatically. For more information, see the topic Using manual dialing or a modem to make calls on p. 187.

If the participant agrees to be interviewed now, the call moves into the **interviewing phase** and the first question is displayed. For more information, see the topic Conducting interviews on p. 194.

An interview might also include a **reviewing phase**, in which you review and if necessary amend the participant's answers after the interview has finished. For more information, see the topic Reviewing interviews on p. 200.

Starting Phone Participants

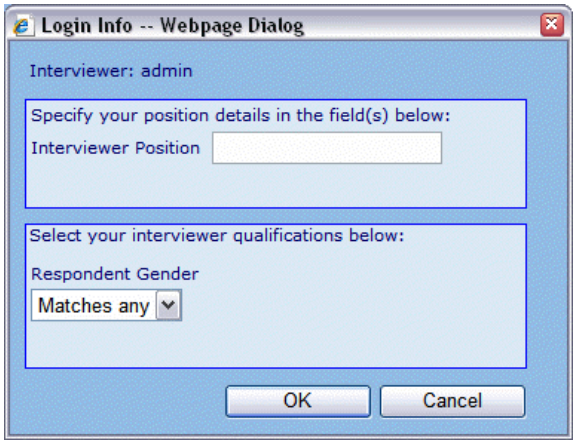
- Select the project you want to work on and click Phone Participants.

This displays the Phone Participants main screen.

When Autodialers are Used

If the call center you are working in uses autodialers to dial participants' phone numbers, a dialog box might open and request that you enter a position name, as shown below:

Figure 1-35
Position dialog box

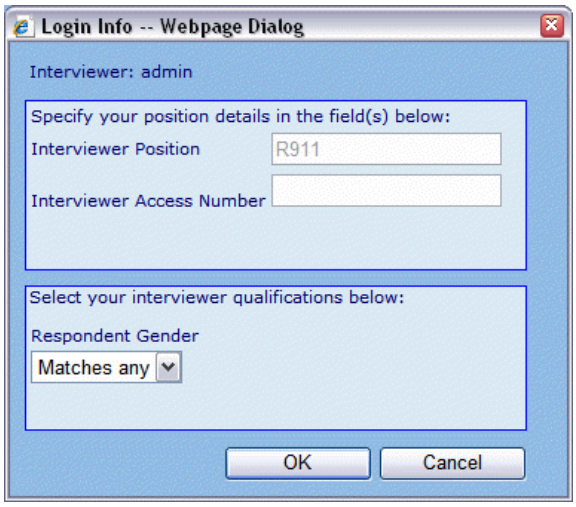


In the Interviewer Position field, enter the position name that your supervisor has given you and click OK. For some projects, your supervisor might want you to dial phone numbers manually even though autodialers are available. If so, a message will inform you that you must use manual dialing to call participants.

Remote Interviewers

When the Position is defined as a remote position (in the dialer configuration file), the following dialog is displayed:

Figure 1-36
Position dialog box for remote interviewers

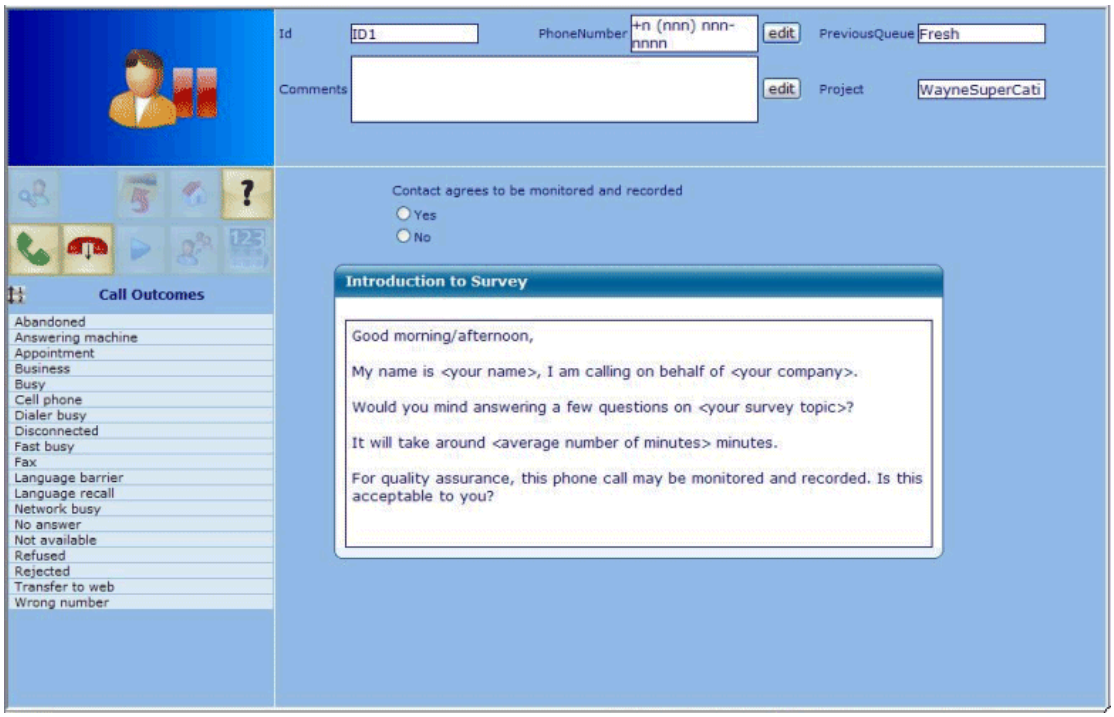


In the Interviewer Access Number field, enter the telephone number for the remote interviewer and click OK.

The Phone Participants main screen

The main screen has four sections: along the top, on the left, in the top left corner, and in the center.

Figure 1-37
Phone Participants main screen



The top of the main screen

When the autodialer connects you to a participant (or, for projects that do not use an autodialer, when you are given a number to call), the section at the top of the screen shows various details about the participant as follows:

- The participant ID number.
- The participant's telephone number. If you have been asked to manually dial a different number to reach the participant, you might be able to change the value in the phone number field, and the old number will be saved in the Audit field of the participant's record with a note of the date on which it was changed.
- The queue from which the number has been selected. If the queue name is FRESH then the participant has not been contacted before on this project. Numbers from other queues have been called before, and the queue name will often indicate the outcome of that call. For example, numbers from the RECALL queue were probably busy or not answered when last called, whereas numbers from the APPOINTMENT queue have had an appointment

time arranged between the participant and a previous interviewer, so the participant will be expecting your call.

- The participant's name, if available. Your supervisor might ask you to update this field when you speak to the participant.
- Comments associated with this number. These comments generally contain useful additional information and might have been added by interviewers who have previously called this number. For example, if the participant is hard of hearing, you might find a note to this effect in the comments box. For more information, see the topic Viewing and entering comments on p. 190.

The left of the main screen

The section on the left of the screen contains buttons for various tasks, such as asking to be connected to a participant, and starting an interview. The buttons are described in the following table:

Button	Description	Keyboard Shortcut (see note below this table)
	Retrieve the next contact. You use this button if the project you are working on does not use an autodialer (that is, you dial numbers manually or by using a modem) and the project has not been set up to select the next contact automatically.	Alt+N
	Retrieve a specific contact. Depending on the options that your supervisor has set, you might not be able to use this button.	Alt+S
	Close Phone Participants and return to the main IBM® SPSS® Data Collection Interviewer Server Administration page.	Alt+X
	Display help for Phone Participants.	Alt+H
	If the project you are working on uses an autodialer, you use this button to ask to be connected to a participant. If the project does not use an autodialer, you might be able to use this button to dial the participant's phone number using a modem.	Alt+/

Button	Description	Keyboard Shortcut (see note below this table)
	If the project you are working on uses an autodialer, you can use this button to end the call immediately if you need to (although normally you should select a call outcome to end the call). If you used a modem to dial the participant's phone number, you must use this button to disconnect the modem at the end the call.	Alt+\
	Start the interview.	Alt+I
	Switch to another project. You can use this button, before retrieving a contact or immediately after completing a survey, to switch to another project to which you are assigned. After you click this button, the Project List dialog displays, allowing you to select another project.	Alt+P
	Cancel the contact. You can use this button after you have retrieved a contact, but before you dial the contact's phone number.	Alt+C
	Occasionally the contact can only be reached via a menu system (for example, "Press 1 for Dr. Smith, press 2 for Dr. Jones"). In these situations, you can use this button to display a dial pad, allowing you to press the appropriate keys. The resultant dial tones are sent to the menu system. This works when you are connected to the Dialer via local extension dialing or via ISDN. *Note*: Audible tones do not occur when clicking dial pad buttons.	Alt+T
	If the project you are working on allows you to specify your interviewer qualifications, you can use this button to set the interviewer qualifications.	
	If the project you are working on includes a reviewing phase, you can use this button in the reviewing phase to reject the interview.	Alt+R

Note: For some browsers, pressing the keyboard shortcut alone will perform the action. For other browsers, you might have to press Enter after pressing the keyboard shortcut.

If you are using an autodialer and the project has been set up to select the next contact as soon as you end your current call, you will see a checked "Auto contact selection" check box below the button frame. Cancel it. If you do not, you will not be able to stop the dialer providing you connections.

Below the buttons, the possible call outcomes for this project are listed. This list will generally be standard across all the projects that you work on; if there are variations your supervisor will tell you. Nevertheless, it is a good idea to familiarize yourself with the call outcome list at the start of each project.

Many call outcomes can be selected using keyboard shortcuts, as shown in the following table. Note that the standard name of each call outcome is shown below—the names you see might be slightly different:

Call Outcome	**Keyboard Shortcut (see note below this table)**
Abandoned	Alt+Z
Answering machine	Alt+M
Appointment	Alt+P
Business	Alt+U
Busy	Alt+B
Cell phone	Alt+J
Dialer Busy	Alt+2
Disconnected	Alt+K
Fast Busy	Alt+3
Fax	Alt+Y
Language barrier	Alt+O
Language recall	Alt+L
Network busy	Alt+4
No answer	Alt+1 (one)
Not Available	Alt+5
Refused	Alt+R
Rejected	Alt+6
Transfer to web	Alt+Q
Wrong number	Alt+W

Note: For some browsers, pressing the keyboard shortcut alone will perform the action. For other browsers, you might have to press Enter after pressing the keyboard shortcut.

If you see more call outcomes than appear in the above table, the next eight call outcomes in the list are assigned keyboard shortcuts from Alt+2 to Alt+9. Any further call outcomes will not have a keyboard shortcut.

You can find out what the keyboard shortcut is for any call outcome by moving the mouse pointer over the call outcome. The keyboard shortcut will then be displayed in a ToolTip.

The top left corner of the screen

A image in the top left corner of the screen shows the current interview status.

Status Image	Description
	Displays when working in manual dialing or modem dialing mode, and indicates that the interviewer is currently not connected to a participant and an interview is not running.
	Displays when working in autodialing mode, and indicates that the interviewer is currently not connected to a participant and an interview is not running.
	Indicates that the interviewer is currently idle.
	Displays when working in manual dialing or modem dialing mode, and indicates that the interviewer is connected to a participant and an interview is currently in progress.
	Displays when working in autodialing mode, and indicates that the interviewer is connected to a participant and an interview is currently in progress.
	Indicates that the Interviewer Server is currently busy.

The center of the main screen

This is where the interview pages will be displayed while you are conducting an interview.

Note: Interviews can be monitored even when you select No for the Contact agrees to be monitored and recorded option. This setting controls when the interview should not be monitored by external parties, not when the interview can be reviewed by a supervisor.

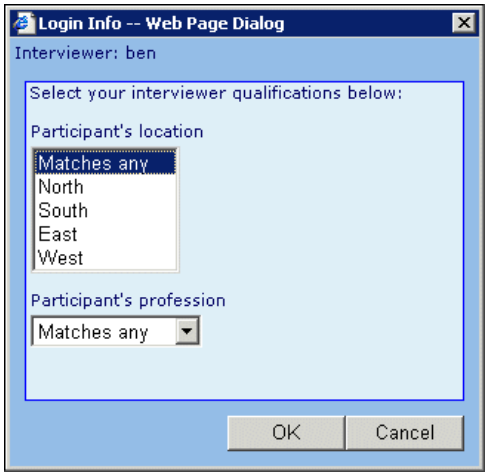
Navigating using the keyboard

Depending on your browser, you might be able to switch between the three sections of the main screen by pressing Ctrl+Tab or F6.

Setting interviewer qualifications

When you may set your own qualifications, Phone Participants displays the Login Info dialog box, listing the qualifications you may set. (If you are using an autodialer, the dialog box will also prompt for your station number.)

Figure 1-38
Login Info dialog box



Single-choice selection lists are shown as a one-line box; multiple-choice lists show the first five items in the list. In the example, if you select North and East, you will be allocated participants who live in those regions but not anyone who lives in the south or west.

"Matches Any" is a special item and is often the default selection. It means that you do not want to filter records using that qualification. In the example, Matches Any means that you will receive records for participants in any location rather than, say, just participants in the West. You can use it to cancel previously set selections in a list.

Setting your qualifications

- Choose at least one item from each qualification list.
- Click OK.

Changing your qualifications

- Click the Change Interviewer Qualifications button as shown below:

Figure 1-39
Change Interviewer Qualifications button

This opens the Interviewer Qualifications dialog box (the same as or very similar to the Login Info dialog box).

- Select the qualifications you want to use for future calls and cancel any that are no longer appropriate.
- Click OK.

Using an autodialer to make calls

If the project you are working on uses an autodialer, it will dial participants' phone numbers for you and connect you to a participant only when he or she picks up the phone. You will not know which participant is being called before he or she answers the call. In some situations, your supervisor might want you to dial numbers manually, even though other interviewers working on the same project are using an autodialer.

When you are connected to a participant, the participant's details are displayed on the main screen together with some introductory text that you should read to him or her. Once you have spoken to the participant, you will either start an interview or select a call outcome from a list of outcomes. Some call outcomes will require you to enter additional information, for example, to specify the date and time of an appointment. When the interview is finished or you have selected a call outcome, you can ask to be connected to another participant.

The "Auto contact selection" check box will be checked if the project has been set up to automatically select your next contact as soon as you finish your current call, and is primarily designed for interviewers who will be dialing manually or using a modem. Cancel this check box otherwise you will not be able to stop the dialer making calls when you reach the end of your shift or need to take a break.

You might be able to change the data in the Phone Number and Name fields if the participant tells you that the current information is wrong. Click edit next to the text box, type the new details in the field, and then click save.

For details of the keyboard shortcuts you can use to click buttons and select call outcomes, see The Phone Participants main screen.

Connecting to a participant

- Make sure that your telephone is off-hook.
- Click the Start Dialing button as shown below:

Figure 1-40
Start Dialing button

The autodialer will attempt to connect you to a participant. There might be a delay before you are connected. If there is a long delay, a message might tell you that the connection attempt has been canceled and that you need to click the Start Dialing button again.

Note: Occasionally, the system might display a participant's details without connecting you to the participant. This happens when another interviewer has added comments to the participant's record, so that you have the opportunity to read the comments before you speak to the participant. When you have read the comments, click the Start Dialing button to dial the participant's phone number.

- When you hear someone answer the phone, do the following:
  - If the participant details at the top of the page show the participant's name, ask to speak to that person.

- Read the introductory text.
- Depending on the options that your supervisor has set, you might be required to ask the participant for consent to having the phone call monitored and recorded by your supervisor. If so, make sure that you record the participant's response by selecting either the Yes or the No option above the introductory text.

Interviewing the participant

▶ If the participant agrees to be interviewed now, click the Start Interview button:

Figure 1-41
Start Interview button

The first question will be displayed. For more information, see the topic Conducting interviews on p. 194.

When you reach the end of the interview, the telephone call is automatically terminated.

▶ You might now be required to review the answers that you have just entered. For more information, see the topic Reviewing interviews on p. 200.

▶ Click the Start Dialing button to connect to another participant.

Scheduling an appointment

▶ If the participant agrees to be interviewed later on, choose the call outcome that lets you make an appointment. For more information, see the topic Making appointments on p. 192.

▶ Enter the appointment time that the participant asks for, and click Submit.

The appointment is made and the telephone call is automatically terminated.

▶ Click the Start Dialing button to connect to another participant.

Reconnecting to a participant

Occasionally, you might be disconnected from a participant before you have finished an interview. For example:

- There is a fault with the telephone network or the autodialer.
- You or the participant accidently hang up the phone.
- You clicked the End Call button because you heard a loud noise on the telephone line.

In this situation, you can normally click the Start Dialing button to recall the participant. If a dialog box opens and asks you to select a call outcome, click Cancel to close the dialog box before you click Start Dialing.

However, if a problem with your computer caused your browser to close, restart Phone Participants and, if available, use the Get last contact option to reconnect to the participant.

Other Outcomes

For all other outcomes, choose an appropriate call outcome from the list on the left of the screen. Most call outcome texts are self explanatory, but your supervisor will probably go through the list with you at the start of the project, especially if the list contains specialized options.

When you select any call outcome other than the one to make an appointment, the telephone call is automatically terminated; click the Start Dialing button to connect to another participant. However, if the autodialer detects that the call is being answered by a fax machine, it will terminate the call immediately. If this happens, you must still select the "Fax" call outcome.

You might sometimes be prompted to select a call outcome without being connected to a participant. This can happen in the following situations:

- You clicked the Start Dialing button in a situation where the participant's details are already displayed on the screen, for example, if a participant's record contains comments for you to read, or you are attempting to reconnect to a participant after being disconnected. In this situation, you must select the appropriate outcome if the call is not answered—the autodialer will not do this for you, and the call will not be terminated until you do so.
- There are technical problems. In this situation, the relevant call outcome might be pre selected, but if not, your supervisor should tell you which call outcome to use.

If you are working on a project where participants speak different languages, you will normally receive only records for participants whose language you speak. If it does happen that you are unable to communicate effectively with the participant, select either the "Language barrier" or the "Language recall" call outcome (your supervisor should tell you which one to use).

Some call outcomes, such as "Abandoned", should be used only after the interview has started. It is important that you choose the most appropriate option from the list as this information will be used to plan future projects. If you accidentally select the wrong call outcome, let your supervisor know immediately so that it can be corrected.

Using manual dialing or a modem to make calls

If the project that you are working on does not use an autodialer, you will need to dial phone numbers manually. For projects that use an autodialer, you might still need to dial numbers manually if your supervisor wants you to do so. However, if there is a modem connected to your computer, you might be able to use the modem to dial phone numbers.

When you request a number to dial, the number and other associated details are displayed on the main screen together with an introductory text to read to the participant.

Once you have made the call, you will either start an interview or select a call outcome from a list of outcomes. Some call outcomes will require you to enter additional information; for example, options to do with appointments prompt you to specify the appointment date and time. When the interview is finished, or you have selected a call outcome, you can request another number to call.

The "Auto contact selection" check box will be checked if the project has been set up to automatically select your next contact as soon as you finish your current call. When you reach the end of your shift or need to take a break, you can click the Cancel Current Contact button. This takes you to the standard page where you may choose Next Contact, Specific Contact, or Exit as appropriate. If you cancel this option you will need to click the Next Contact button at the end of every call to request a new participant to call. Your supervisor will tell you if you may do this.

You might be able to change the data in the Phone Number and Name fields if the current information is out of date. Click edit next to the text box, type the new details in the field, and then click save.

For details of the keyboard shortcuts you can use to click buttons and select call outcomes, see The Phone Participants main screen.

Requesting a number and make a call

- Click the Next Contact button as shown below:

Figure 1-42
Next Contact button

- If for any reason you do not want to dial the number you have been allocated, click the Cancel Contact button:

Figure 1-43
Cancel Contact button

Then click the Next Contact button again when you are ready to make another call.

- If there is a Dial Contact button as shown below, click the button to use a modem to dial the participant's phone number:

Figure 1-44
Dial Contact button

- If there is no Dial Contact button, dial the phone number manually.

- If the phone is answered, do the following:
  - If the participant details at the top of the page show the participant's name, ask to speak to that person.
  - Read the introductory text.
  - Depending on the options that your supervisor has set, you might be required to ask the participant for consent to having the phone call monitored and recorded by your supervisor. If so, make sure that you record the participant's response by selecting either the Yes or the No option above the introductory text.

Interviewing the participant

- If the participant agrees to be interviewed now, click the Start Interview button:

Figure 1-45
Start Interview button

The first question will be displayed. For more information, see the topic Conducting interviews on p. 194.

- Complete the interview.

- If you used the Dial Contact button to dial the participant's phone number, you must click the End Call button (to disconnect the modem) after you finish the interview:

Figure 1-46
End Call button

- You might now be required to review the answers that you have just entered. For more information, see the topic Reviewing interviews on p. 200.

- If your next number is not selected automatically, click the Next Contact button to request another number.

Scheduling an appointment

- If the participant agrees to be interviewed later on, choose the call outcome that lets you make an appointment. For more information, see the topic Making appointments on p. 192.

- Enter the appointment time that the participant asks for, and click Submit.

  The appointment is made.

- If you used the Dial Contact button to dial the participant's phone number, you must click the End Call button (to disconnect the modem) after you make the appointment:

Figure 1-47
End Call button

- If your next number is not selected automatically, click the Next Contact button to request another number.

Other Outcomes

For all other outcomes, choose an appropriate call outcome from the list on the left of the screen. Most call outcome texts are self explanatory, but your supervisor will probably go through the list with you at the start of the project, especially if the list contains specialized options.

If you used the Dial Contact button to dial the participant's phone number and you select any call outcome other than the one to make an appointment, the telephone call is automatically terminated. If your next number is not selected automatically, click the Next Contact button to request another number to call.

If you are working on a project where participants speak different languages, you will normally receive only records for participants whose language you speak. If it does happen that you are unable to communicate effectively with the participant, select either the "Language barrier" or the "Language recall" call outcome (your supervisor should tell you which one to use).

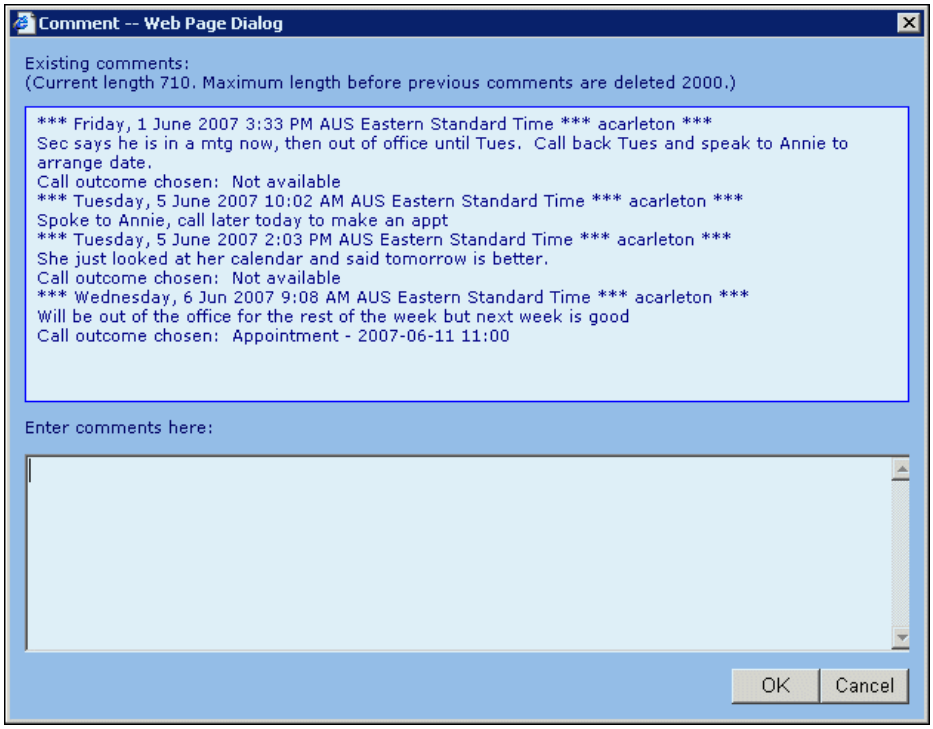
Some call outcomes, such as "Abandoned", should be used only after the interview has started. It is important that you choose the most appropriate option from the list as this information will be used to plan future projects. If you accidentally select the wrong call outcome, let your supervisor know immediately so that it can be corrected.

Viewing and entering comments

When you call a participant, you may obtain information that is useful to other interviewers who call that person. For instance, if the participant is hard of hearing your may wish to record this information so that the next person who calls the participant will know to speak slowly and clearly. Another time when comments are useful is when you arrange an appointment. You can record the reason why you made the appointment, and any special instructions the participant may have given you. This is particularly useful in business to business calling, where you may arrange the appointment with the participant's secretary.

All comments are stored in the sample record and are displayed in the Comments box at the top of the interviewing screen. A note next to the box tells you how many comments there are. You can view the comments by scrolling through the text, but it's easier to click the edit button next to the Comments box to display them in a new dialog box.

Figure 1-48
Comments dialog box


Comment -- Web Page Dialog
Existing comments:
(Current length 710. Maximum length before previous comments are deleted 2000.)
*** Friday, 1 June 2007 3:33 PM AUS Eastern Standard Time *** acarleton ***
Sec says he is in a mtg now, then out of office until Tues. Call back Tues and speak to Annie to arrange date.
Call outcome chosen: Not available
*** Tuesday, 5 June 2007 10:02 AM AUS Eastern Standard Time *** acarleton ***
Spoke to Annie, call later today to make an appt
*** Tuesday, 5 June 2007 2:03 PM AUS Eastern Standard Time *** acarleton ***
She just looked at her calendar and said tomorrow is better.
Call outcome chosen: Not available
*** Wednesday, 6 Jun 2007 9:08 AM AUS Eastern Standard Time *** acarleton ***
Will be out of the office for the rest of the week but next week is good
Call outcome chosen: Appointment - 2007-06-11 11:00
Enter comments here:
OK
Cancel

Each comment is displayed on three lines. The first line shows the date and time (local to the interviewing server) at which the comment was entered, the server's time zone, and name of the interviewer who wrote the comment. The date and time are shown in the "long" format that gives month and day names, which makes the information easy to understand regardless of the date and time format you are used to.

The second line shows the comment itself. If the comment is long, this line will be split over a number of physical lines in the dialog box. The third line shows the call outcome and, if the interviewer arranged an appointment, the date and time of the appointment in the format yyyy–mm–dd hh:mm. If there is more than one comment for a single call, only the last one has a call outcome.

You cannot change or delete these comments, but you can append new ones to them.

The Comments box on the main screen can display up to 2000 characters. If the total size of all comments exceeds this, the earliest comments are deleted and the words "*** Earlier comments removed ***" are inserted in their place. It is therefore a good idea to keep comments as brief as possible, perhaps by abbreviating or omitting commonly used words.

The Comments box normally displays comments in chronological order, but your administrator may have changed this if your company prefers newer comments to appear at the top of the list.

Viewing and adding comments

▶ On the main screen, click edit next to the Comments box.

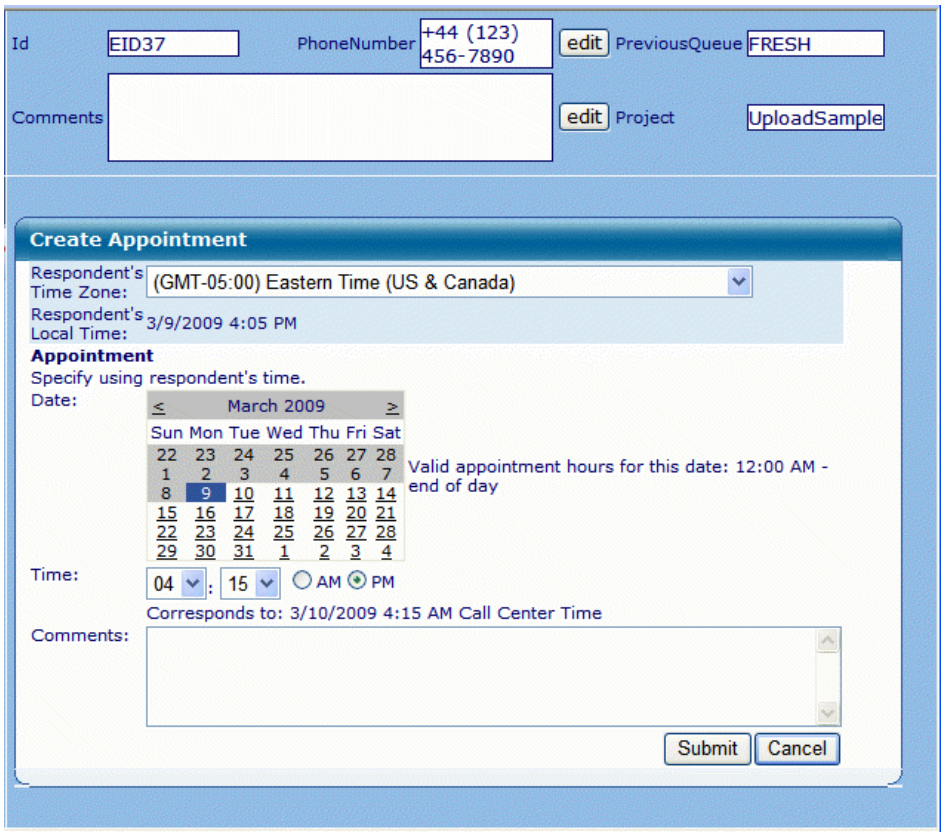
The Comments dialog box is displayed, showing any existing comments.

- To add new comments, type them into the blank box at the foot of the dialog box. Text wraps automatically in the box; press Enter if you want to force a new line in the comment text.
- Click OK to close the dialog box. If you have entered a new comment it is added to the comments list.

Making appointments

When you choose a call outcome that allows an appointment to be made, you will see the Create Appointment dialog box.

Figure 1-49
Create Appointment dialog box



- In Respondent's Time Zone, select the time zone in which the participant is located. Often the participant's time zone is defined in his or her participant record so you will not need to change this field.
- Use the calendar to select the appointment date. Click the date on which you want to call back (today's date is preselected). If necessary, use the arrow keys in the month bar to move to a different month.
- In the Time drop-down lists, select the time at which the participant asks you to call. Therefore, the time that you select is the time in the participant's time zone. If the participant says something like

"Call back in two hours", you can calculate the appointment time by adding two hours to the time shown in "Respondent's Local Time", which is displayed just below Respondent's Time Zone.

If the participant says something like "Any time after 3 pm", it is a good idea to set the time to something like 3:15 pm to ensure that the number will not be selected before 3 pm. (Numbers with appointments might become eligible for calling a short while before the appointment time, to cater for participants who ask to be called back "around 3 pm".) Your supervisor will tell you what the requirements are for the project you are working on.

- If you have other information that might be useful to the next person who calls this number, enter it in the Comments field and it will be appended to the list of comments in the main Comments box.
- Click Submit.

Retrieving a specific participant

Depending on the options that your supervisor has set, you might be able to retrieve a specific participant. You can use this feature to retrieve your last contact or search for another contact.

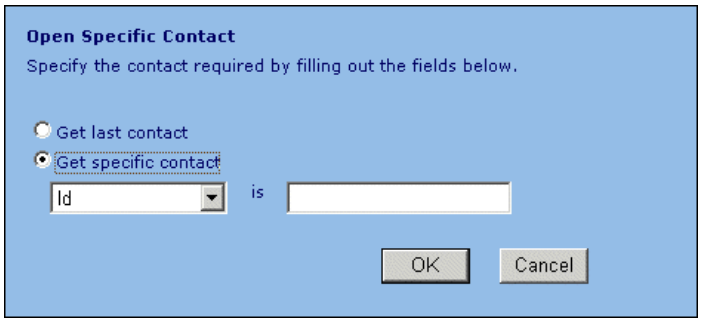
Retrieving a specific participant

- On the Phone Participants main screen, click the Specific Contact button as shown below:

Figure 1-50
Specific Contact button

The Specific Contact dialog box opens.

Figure 1-51
Specific Contact dialog box



- To retrieve your last contact, select Get last contact and click OK.

  The dialog box will close and your last contact will be displayed at the top of the main screen.
- To search for a contact, select Get specific contact.
- From the drop-down list, select the field that you want to search.
- In the edit box, type the value that you want to search for.

- Click OK to start the search.

  If a participant is found that matches your search criteria, the dialog box will close and the participant's details will be displayed at the top of the main screen. Your supervisor will tell you what will happen if more than one matching participant is found—typically, only the first participant found will be displayed.

  If no matching participant is found, a message will appear in the dialog box. You can then choose to modify the search criteria and click OK to search again or click Cancel to close the dialog box.

- If the participant found is not the one you want, click the Cancel Contact button:

  Figure 1-52
  Cancel Contact button

  Then click the Specific Contact button again.

- When you have found the participant you are looking for, click the Start Dialing or Dial Contact button:

  Figure 1-53
  Start Dialing or Dial Contact button

- If there is no such button, dial the phone number manually.

Conducting interviews

The interviewing program displays the questions that the current participant needs to answer. Depending on the complexity of the questionnaire and the answers that the participant gives, the questions that you see might not be the same for every person that you call. Sometimes, the responses that you see for a question will vary according to the participant's answers to previous questions. Often, your supervisor will go through the questionnaire with you before you start interviewing, so you know what sorts of answers are valid for each question.

Using the keyboard or the mouse

Depending on the settings for the Phone Participants activity, you might be able to conduct interviews using the keyboard only, or you might need to use both the keyboard and the mouse. Your supervisor will tell you which of these methods you should use.

For interviews that require the keyboard only, the following keys have special uses:

Key	Use
Page Down	Display the next question.
Page Up	Display the previous question.

Key	Use
Tab	If more than question is displayed on the screen, move the cursor to the next question.
Ctrl+Tab	If more than question is displayed on the screen, move the cursor to the previous question.
Enter	For text questions, displays the next question.
Shift+Enter	Insert new lines within a text question's response.
Up Arrow	Use only for questions other than text questions. If more than question is displayed on the screen, move the cursor to the previous question on the screen (same as Ctrl+Tab). If only one question is displayed on the screen, display the previous question (same as Page Up).
Space and **Dash\Hyphen**	Can be used between multiple answers for multiple-response, categorical questions.

For interviews that use the mouse, click the Next button to display the next question and click the Previous button to display the previous question.

For interviews that require the keyboard only, the methods for answering different types of questions are explained in the following topics. See "In This Section" below.

Valid keycode keystrokes

The following keystrokes can be used in support of keycodes created in IBM® SPSS® Data Collection Author and IBM® SPSS® Data Collection Base Professional.

Keycode	Description	Example
A-Z, 0-9	Common keycodes	A, 5
CTRL+ [0-9]	CTRL based keycode. CTRL + any keycode that is between "0" and "9".	CTRL+1, CTRL+4, CTRL+9

Note: Avoid using keycodes that start with the same characters. You should not define ambiguous keycodes, especially when one keycode is a part of another keycode. For example:

```
Q1 "What activities do you like?" {Basketball keycode(1), Football keycode(11)};
```

For this question, the interviewer's intention cannot be determined when the 1 key is pressed. Changing the keycodes to the following would result in better results:

```
Q1 "What activities do you like?" {Basketball keycode(01), Football keycode(11)};
```

For this question, the interviewer's intention can be determined because although both keycodes contain 1, the interviewer must press a unique first character.

General procedure for conducting interviews

When you click Start Interview the interviewing program displays the first question in the main part of the screen. For each question, read the exact words of the question out to the participant (excluding any instructions to interviewers) and select or enter the participant's answer.

Most interview pages contain just one question. If a page contains more than one question you must enter answers for all questions before moving on to the next question.

The interviewing program displays error messages, usually in red, if you enter an invalid answer and waits for you to enter another response.

Depending on the answers the participant gives, you might notice that different questions are displayed for different participants. The interviewing program keeps track of which questions each must answer and always presents the correct questions in the correct order.

At the end of the interview, the review phase might start automatically. If it doesn't, click the Review Completed Interview button if there is one. Otherwise, if your next number is not selected automatically, click Start Dialing or Next Contact if you want to make another call, or Exit to close the Phone Participants activity.

Multiple-choice questions

When the question is followed by a list of answers, you must choose the answer from the list. Some questions require that only one answer is selected from the list whereas other questions allow more than one answer to be selected. The way in which you make the selection depends on whether the interview can be conducted using the keyboard only or whether the mouse must be used as well.

- **For interviews that require the keyboard only.** All the answers in the list are numbered. If only one answer can be selected from the list, the numbers will be enclosed in parentheses, for example, (3). If more than one answer can be selected, the numbers will be enclosed in brackets, for example, [3]. To select an answer, press the appropriate number key. To select multiple answers, press the appropriate number keys in any order. The answer or answers that you select will be highlighted in the question.
- **For interviews that use the mouse.** If only one answer can be selected from the list, a radio button is displayed next to each answer. If more than one answer can be selected, a check box is displayed next to each answer. To select an answer, click on the appropriate radio button or check box.

To cancel a single-choice answer, select a different answer. To cancel a multiple-choice answer, select the same answer again.

When answering multiple-choice questions, be aware of the following:

- Some multiple-choice questions that allow multiple answers might include answers that are shown in bold text. These answers cannot be combined with any other answer in the list.
- If the list contains an answer called "Other" followed by a text box, first select the answer and then type the words in the text box. For interviews that require the keyboard only, the cursor will automatically move to the text box when you select the answer.
- If the response list is shown as a grid of single-choice or multiple-choice answers, you must select an answer for each question in the grid. Usually, the questions are the rows of the grid and the answers are the columns, but this is not always so.

Numeric, Text, Date/Time, and Yes/No questions

In addition to multiple-choice questions, you might also see questions that require numeric, text, date/time, or boolean ("yes" or "no") answers.

Numeric Questions

Questions that have numeric answers can be set up to accept only whole numbers or only real (decimal) numbers. If the question requires a real response, you must always enter a decimal point and at least one decimal place even if the answer is a whole number.

Questions that have numeric answers might specify a range of valid answers, and will reject answers outside of this range.

Text Questions

Questions with text answers display a box of about six lines in which you should try to type the participant's exact words. There is no need to press Return or Enter at the end of each line. If you make mistakes, you can backspace over them and retype to make the corrections.

Your supervisor might ask you to write down long text responses rather than typing them as the participant speaks. If you have to do this, you must write down the participant ID number (the Id box at the top of the screen) and the full question name as it appears on the screen, as well as the participant's answer. If you forget to do this it might not be possible to assign the response text to the correct participant later on.

Date, Time, and Date/Time Questions

Date questions might accept an answer in several different formats, for example, mm/dd/yy, or dd/mm/yy, or dd-mmm-yyyy. To ensure that the answer that you enter is unambiguous, use the dd-mmm-yyyy format, for example, 01-Jan-2000. Time questions will normally require an answer in an hh:mm or hh:mm:ss format. Sometimes, a question might require a date/time answer, such as 01-Jan-2000 22:30:00.

Like numeric questions, date, time, and date/time questions might require an answer within a certain range.

Boolean Questions

Boolean questions require participants to answer by saying "yes" or "no", or "true" or "false". For some boolean questions, you have to select from one of two options, for example, "Yes, wants to subscribe" and "No, doesn't want to subscribe". For other boolean questions, there might be just a single option that you should select if the participant says "yes" or "true". To select an answer to a boolean question, use one of the following methods:

- **For interviews that require the keyboard only.** If two answers are shown, press the number key (either 1 or 2) that corresponds to the appropriate answer. If only one answer is shown, press 1 only if the participant answers "yes" or "true".
- **For interviews that use the mouse.** If the answer consists of two radio buttons, click the appropriate radio button. If the answer consists of a single check box, click the check box only if the participant answers "yes" or "true".

Special Responses

Sometimes, a numeric, text, date/time, or boolean question might include one or more special responses that you can select when the participant cannot or does not want to answer the question. For example, you might be able to select a special response that says "Don't know" or "Refuse to answer". To select a special response, use one of the following methods:

- **For interviews that require the keyboard only.** Press the keyboard shortcut that is shown alongside the special response, that is, Ctrl+1 for the first special response in the list, Ctrl+2 for the second, and so on.
- **For interviews that use the mouse.** Click on the appropriate check box.

To cancel a special response, select the same special response again.

Your answer will usually be rejected if you select a special response in addition to entering an answer, or if you select more than one special response.

Playing a sound to the participant

If the project you are working on uses an autodialer, some questions might require you to play a prerecorded sound to the participant. For example, the question might ask for the participant's opinion on an advertising jingle.

The question text will normally indicate that you must play a sound after you have asked the question. Sometimes, there might be a separate sound for each answer in a multiple-choice question, and you will need to play these one after the other.

If you are required to play a sound, the following buttons will appear close to the question text or, for some multiple-choice questions, the answer texts:

Button	Description
	Play the sound
	Stop playing the sound

To play the sound again, click the Play button again.

For interviews that require the keyboard only

The following table describes the keyboard shortcuts that you can use:

Item that has a sound	Keyboard shortcut to play or stop playing the sound
A question	Ctrl+Shift+P
An answer to a multiple-choice question	Shift+n, where n is the answer number shown on the screen. For example, Shift+4 for answer number 4. If the answer number is 10 or more, hold down the Shift key while you type the number.
A special response to a numeric, text, date/time, or yes/no question	Ctrl+Shift+n, where n indicates the nth special response shown on the screen. For example, Ctrl+Shift+2 for the 2nd special response.
A question that does not require an answer, but simply contains other questions	It is not possible to use the keyboard to play a sound for this type of question—you must use the mouse.

Note: For some browsers, pressing the keyboard shortcut alone will perform the action. For other browsers, you might have to press Enter after pressing the keyboard shortcut.

If more than one question is displayed on the screen, make sure that you move the cursor to the question with the Play and Stop buttons before you press the keyboard shortcuts.

Recording the participant's answer

If the project you are working on uses an autodialer, some questions might require you to record the participant's answer to an audio file. You might be required to do this in addition to typing the answer or choosing an answer from a list.

The question text will normally indicate that you must record the participant's answer after you have asked the question. In addition, the following buttons will appear close to the question text:

Button	Description
	Record the participant
	Stop recording the participant

You can click the Record button as many times as required. Only the last recording will be saved to an audio file.

If you do not stop the recording, it will be stopped automatically when you display the next question.

For interviews that require the keyboard only

You can start or stop the recording using Ctrl+Shift+R. Note that for some browsers, pressing this keyboard shortcut alone will perform the action. For other browsers, you might have to press Enter after pressing the keyboard shortcut.

If more than one question is displayed on the screen, make sure that you move the cursor to the question with the Record and Stop buttons before you press the keyboard shortcut.

Changing the answer to a previous question

If the participant changes his or her mind about the answer to a previous question, first display the question using one of the following methods:

- **For interviews that require the keyboard only.** Press the PAGE UP key until the question is displayed.
- **For interviews that use the mouse.** Click the Previous button until the question is displayed.

Then change the answer as appropriate. If the question requires you to record the participant's answer, your new recording will overwrite the previous one that was made for this question.

Changing an answer might mean that some of the questions you have already answered become invalid, or that you will see some additional questions to the ones you saw previously. If a question already has an answer, the interviewing program displays it and, if it is still correct, you can move straight to the next question.

Terminating interviews part-way through

If the participant starts an interview but is unwilling to finish it, you should try to terminate it by selecting an appropriate call outcome from the list. For example, if the participant refuses to continue the interview, you should select the "Abandoned" call outcome. This terminates the interview immediately and leaves you ready to request the next participant.

You might also be able to terminate the interview using one of the following methods:

- **For interviews that require the keyboard only.** Press the ESC key.
- **For interviews that use the mouse.** Click the Stop button if one is displayed.

Your supervisor will normally tell you if you can use one of these methods.

Reviewing interviews

The project that you are working on might require you to review the participant's answers after the interview has completed. The reviewing phase might start automatically at the end of the interview, or you might need to click a button to start the review.

Depending on the options that your supervisor has set, you might be able to review all answers, or only answers to text questions. As you conduct the review, you can amend any answers that you did not enter correctly during the interview, for example, if a text response contains a spelling mistake. In addition, if your supervisor asked you to write down the participant's text responses instead of typing them in, you can use the reviewing phase to type them in.

When reviewing an interview, you might find that if you change the answer to a question, typically a multiple-choice question, additional questions appear that did not appear when you conducted the interview. Your supervisor will tell you what to do if this should happen. You might be asked to leave these questions unanswered, or your supervisor might tell you which answers to enter.

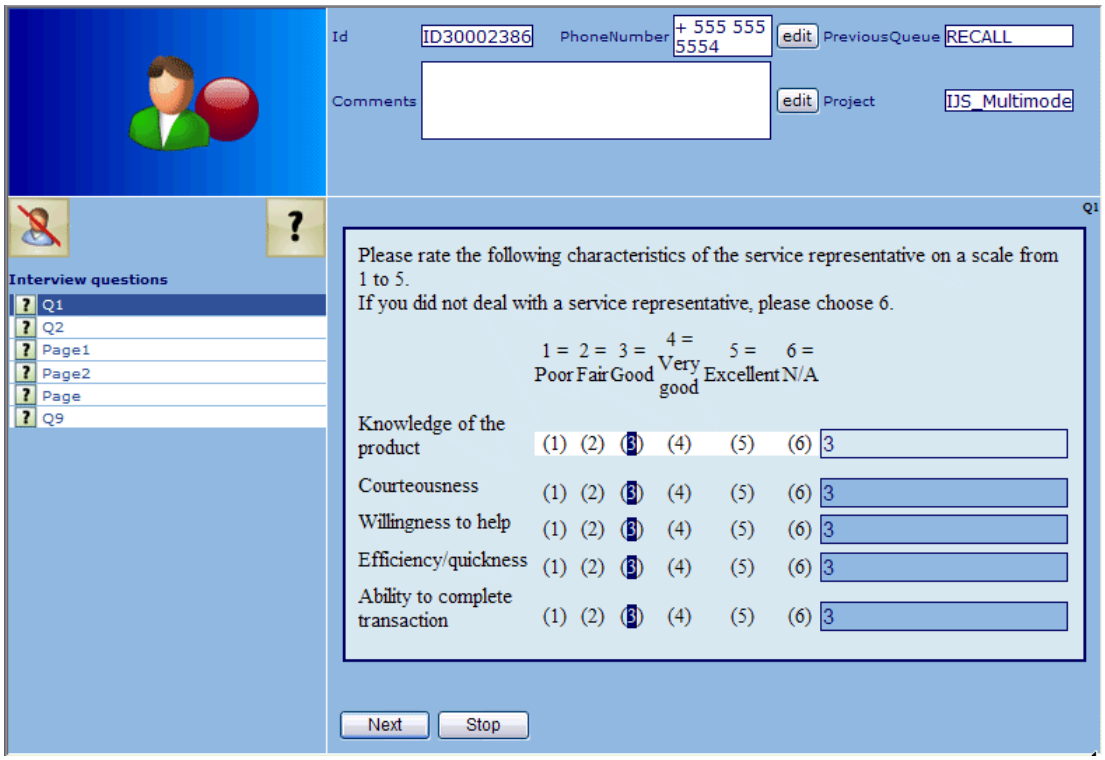
Starting a review

If the review does not start automatically when you end an interview or choose a call outcome, click the Review Current Interview button in the center of the Phone Participants main screen.

Note that you can only review the interview that you have just completed. It is not possible for you to review any other interviews.

The Review screen

Figure 1-54
The Review screen



When the review starts, the Phone Participants activity shows the following information:

- The **top** of the main screen displays the same Participant's details that were displayed when the interview was conducted. If any of the fields are shown as being editable, you can update them while you are conducting the review.
- The **left** of the main screen displays a list of the questions that were asked during the interview. You can click any question name to jump straight to that question.
- The **center** of the main screen displays the current question. If you entered an answer to that question during the interview, the answer is shown.

Conducting the Review

You can navigate through the questions and amend any answer using the same methods that you use for conducting interviews. That is, you might be able to use the keyboard only, or you might need to use the mouse as well. For more information, see "Using the Keyboard or the Mouse" in Conducting interviews. You can also jump straight to any question by clicking the question name in the list on the left.

If changing the answer to a question would cause additional questions to appear that did not appear when you conducted the interview (or cause existing questions to disappear), a warning message is displayed. When you click OK, the question list on the left of the main screen will

refresh to include any additional questions and to remove any existing questions that are no longer relevant.

If a question allowed you to record the participants's answer (or the answer was recorded automatically), the following buttons will appear to allow you to listen to the recording:

Button	Description
	Play the participant's answer
	Stop playing the participant's answer

Alternatively, press Ctrl+Shift+P to play or stop playing the participant's answer.

Ending the Review

The review ends normally when you reach (or jump to) the last question and press ENTER or click Next. You might also be able end a review by pressing the ESC key or clicking the Stop button if there is one.

Alternatively, your supervisor might ask you to reject interviews that do not meet certain standards. To reject an interview and end the review, click the Reject Interview button as shown below:

Figure 1-55
Reject Interview button

At the end of the review, if your next number is not selected automatically, click Start Dialing or Next Contact if you want to make another call, or Exit to close the Phone Participants activity.

Closing Phone Participants

- On the main screen, click the Exit button as shown below:

Figure 1-56
Exit button

Translating call outcomes codes

The following instructions explain the process of providing translated call outcomes codes in the Phone Participants interface.

Note: These instructions assume you have access to the IBM® SPSS® Translation Utility application.

1. Log into IBM® SPSS® Data Collection Interviewer Server Administration and select an appropriate project from the project list.

2. Click on Files and download the appropriate *catiCallOutcomes_<Project Name>.mdd* file (the file should be checked into a shared location).
3. Open the *catiCallOutcomes_<Project Name>.mdd* file in SPSS Translation Utility and display the Analysis context.
4. From the SPSS Translation Utility menu, select Tools > Add / Remove Languages.
5. Add the translated text in the appropriate language column.
6. Save the *catiCallOutcomes_<Project Name>.mdd* file.
7. Back in the Interviewer Server Administration Files activity, upload the *catiCallOutcomes_<Project Name>.mdd* file you just saved. Make sure you select No when asked to rename the file, and select the Check In option.
8. Login as an interviewer who has access to the updated project and ensure the Interviewer Server Administration Options > Preferences are set to the newly added language.
9. Test within the Phone Participants activity. The newly added call outcome translations should display as expected.

Notes

- If the *catiCallOutcomes_<Project Name>.mdd* file is updated during active Phone data collection, interviewers will need to exit and reenter the Phone Participants activity before the translated call outcomes will display.
- To update the default *.mdd* for all new projects, update the *catiCallOutcomes_default.mdd* file (located in *[INSTALL_FOLDER]\IBM\SPSS\DataCollection\6\Interviewer Server\FMRoot\Shared\Cati*) on the primary application server.

Review Interviews

You use this activity to review the interviews that your telephone interviewers have completed. If necessary, you can amend the answers that the interviewer entered.

Starting Review Interviews

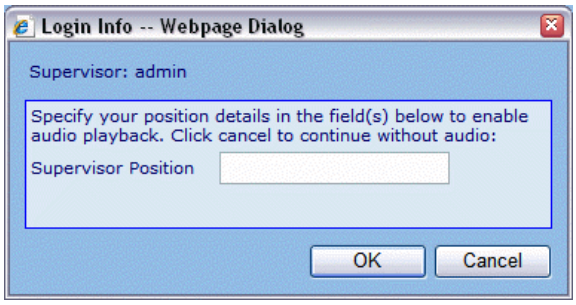
▶ Select the project you want to work on and click Review Interviews.

This displays the Review Interviews main screen.

When Autodialers are Used

If the call center that you are working in uses autodialers to call participants, a dialog box might open and request that you enter a position name, as shown below:

Figure 1-57
Position dialog box

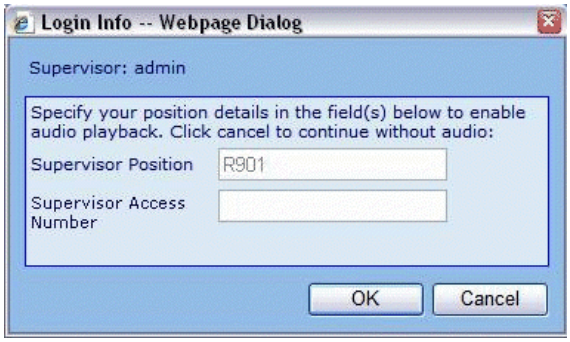

Login Info -- Webpage Dialog
Supervisor: admin
Specify your position details in the field(s) below to enable audio playback. Click cancel to continue without audio:
Supervisor Position
OK
Cancel

In the Supervisor Position field, enter the position name and click OK. If you click Cancel instead, the Review Interviews activity will still open, but you will not be able to listen to audio recordings of participants' answers.

Remote Supervisors

When the Supervisor Position is defined as a remote position (in the dialer configuration file), the following dialog is displayed:

Figure 1-58
Supervisor Position dialog box for remote supervisors


Login Info -- Webpage Dialog
Supervisor: admin
Specify your position details in the field(s) below to enable audio playback. Click cancel to continue without audio:
Supervisor Position
R901
Supervisor Access Number
OK
Cancel

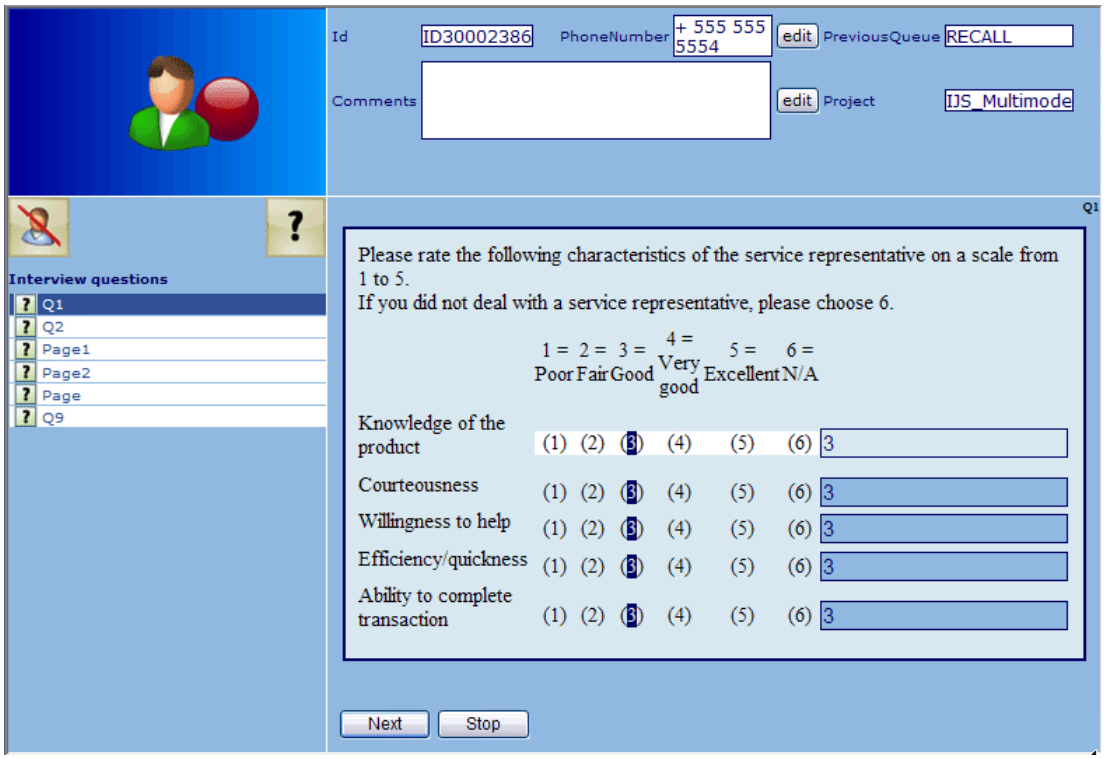
In the Supervisor Access Number field, enter the telephone number for the remote supervisor and click OK.

For more information, see Dialer Administration.

The Review Interviews Main Screen

The main screen has three sections: in the center, at the top, and on the left.

Figure 1-59
Review Interviews main screen



The Center of the Main Screen

After you start the Review Interviews activity, you use the options displayed in the center of the main screen to select the interview that you want to review. You can also specify whether you want to review all questions or only text questions.

As you navigate through the interview, the questions appear in the center of the main screen and show the answers that the interviewer entered.

The Top of the Main Screen

When the review starts, the frame at the top of the screen shows various details about the participant who was interviewed, such as his or her ID number, name, and telephone number. If any of the fields are shown as being editable, you can update them while you are conducting the review. You might also see comments associated with this participant, which have been added by interviewers who have called or interviewed this participant. For more information, see the topic Viewing and entering comments on p. 190.

The Left of the Main Screen

The left of the main screen displays a list of the questions that were asked during the interview. You can click any question name to jump straight to that question.

Above the list of questions are buttons for various tasks as described below:

Button	Description	Keyboard Shortcut (see note below this table)
	Reject the interview. For more information, see the topic Ending a Review on p. 210.	Alt+R
	Close Review Interviews and return to the main IBM® SPSS® Data Collection Interviewer Server Administration page.	Alt+X
	Display help for Review Interviews.	Alt+H

Note: For some browsers, pressing the keyboard shortcut alone will perform the action. For other browsers, you might have to press Enter after pressing the keyboard shortcut.

Navigating Using the Keyboard

Depending on your browser, you might be able to switch between the three sections of the main screen by pressing Ctrl+Tab or F6.

Selecting an Interview to Review

Figure 1-60
Selecting an interview to review

- To review only text questions (including "Other" answers in multiple-choice questions), select Open-ends only in the center of the main screen. If you do not select this option, you will be able to review all questions.
- From the drop-down list in the center of the main screen, select the field that you want to use to search for an interview.
- In the edit box, type the value that you want to search for. Enclose the value with % to search for interviews that include comments (for example, %4964%).

  Note: You can add % around
- Click Next to start the search.

If an interview is found that matches your search criteria, the questions asked in that interview will be listed on the left of the main screen. If more than one matching interview is found, the first interview's questions will be listed.

Note: If the interview found is not the one you want, you should accept the interview as described in Ending a Review, as this will allow the interview to be reviewed again.

If no matching interview is found, an error message will appear. You can then modify the search criteria and click Next to search again.

Conducting a Review

After you have selected an interview, click on a question name on the left of the main screen to start the review.

Using the Keyboard or the Mouse

Depending on the settings for the Review Interviews activity, you might be able to conduct reviews using the keyboard only, or you might need to use both the keyboard and the mouse.

For reviews that require the keyboard only, the following keys have special uses:

Key	Use
Page Down	Display the next question.
Page Up	Display the previous question.
Tab	If more than question is displayed on the screen, move the cursor to the next question.
Ctrl+Tab	If more than question is displayed on the screen, move the cursor to the previous question.
Enter	For text questions, displays the next question.
Shift+Enter	Insert new lines within a text question's response.
Up Arrow	Use only for questions other than text questions. If more than question is displayed on the screen, move the cursor to the previous question on the screen (same as Ctrl+Tab). If only one question is displayed on the screen, display the previous question (same as Page Up).
Space and **Dash\Hyphen**	Can be used between multiple answers for multiple-response, categorical questions.

For interviews that use the mouse, click the Next button to display the next question and click the Previous button to display the previous question.

General Procedure for Conducting Reviews

The interviewing program displays error messages, usually in red, if you enter an invalid answer and waits for you to enter another response.

For some questions, typically multiple-choice questions, changing the answer could cause additional questions to appear that did not appear when the interview was conducted. In addition, changing the answer might cause other existing questions to disappear. In this situation, a warning

message is displayed telling you that the path you are now taking through the interview is no longer the path that the interviewer took.

If the participant's answer to a question has been recorded, the following buttons will appear to allow you to listen to the recording:

Button	Description
	Play the participant's answer
	Stop playing the participant's answer

Alternatively, press Ctrl+Shift+P to play or stop playing the participant's answer.

Note: Automatically calculated answers will not be updated when a review is conducted using the Review Interviews activity.

Changing the Answer to a Question

This topic explains how to change the answers to different types of questions when conducting a review. In addition to multiple-choice questions, you might also see questions that require numeric, text, date/time, or boolean ("yes" or "no") answers.

Multiple-Choice Questions

When the question is followed by a list of answers, you must choose the answer from the list. Some questions require that only one answer is selected from the list whereas other questions allow more than one answer to be selected. The way in which you make the selection depends on whether the interview can be conducted using the keyboard only or whether the mouse must be used as well.

- **For interviews that require the keyboard only.** All the answers in the list are numbered. If only one answer can be selected from the list, the numbers will be enclosed in parentheses, for example, (3). If more than one answer can be selected, the numbers will be enclosed in brackets, for example, [3]. To select an answer, press the appropriate number key. To select multiple answers, press the appropriate number keys in any order. The answer or answers that you select will be highlighted in the question.
- **For interviews that use the mouse.** If only one answer can be selected from the list, a radio button is displayed next to each answer. If more than one answer can be selected, a check box is displayed next to each answer. To select an answer, click on the appropriate radio button or check box.

To cancel a single-choice answer, select a different answer. To cancel a multiple-choice answer, select the same answer again.

When answering multiple-choice questions, be aware of the following:

- Some multiple-choice questions that allow multiple answers might include answers that are shown in bold text. These answers cannot be combined with any other answer in the list.

- If the list contains an answer called "Other" followed by a text box, first select the answer and then type the words in the text box. For interviews that require the keyboard only, the cursor will automatically move to the text box when you select the answer.
- If the response list is shown as a grid of single-choice or multiple-choice answers, you must select an answer for each question in the grid. Usually, the questions are the rows of the grid and the answers are the columns, but this is not always so.

Numeric Questions

Questions that have numeric answers can be set up to accept only whole numbers or only real (decimal) numbers. If the question requires a real response, you must always enter a decimal point and at least one decimal place even if the answer is a whole number.

Questions that have numeric answers might specify a range of valid answers, and will reject answers outside of this range.

Text Questions

Questions with text answers display a box of about six lines in which the participant's words have been entered. When amending the text, there is no need to press Return or Enter at the end of each line.

Date, Time, and Date/Time Questions

Date questions might accept an answer in several different formats, for example, mm/dd/yy, or dd/mm/yy, or dd-mmm-yyyy. To ensure that the answer that you enter is unambiguous, use the dd-mmm-yyyy format, for example, 01-Jan-2000. Time questions will normally require an answer in an hh:mm or hh:mm:ss format. Sometimes, a question might require a date/time answer, such as 01-Jan-2000 22:30:00.

Like numeric questions, date, time, and date/time questions might require an answer within a certain range.

Boolean Questions

Boolean questions require participants to answer by saying "yes" or "no", or "true" or "false". For some boolean questions, you have to select from one of two options, for example, "Yes, wants to subscribe" and "No, doesn't want to subscribe". For other boolean questions, there might be just a single option that you should select if the participant says "yes" or "true". To select an answer to a boolean question, use one of the following methods:

- **For interviews that require the keyboard only.** If two answers are shown, press the number key (either 1 or 2) that corresponds to the appropriate answer. If only one answer is shown, press 1 only if the participant answers "yes" or "true".
- **For interviews that use the mouse.** If the answer consists of two radio buttons, click the appropriate radio button. If the answer consists of a single check box, click the check box only if the participant answers "yes" or "true".

Special Responses

Sometimes, a numeric, text, date/time, or boolean question might include one or more special responses that you can select when the participant cannot or does not want to answer the question. For example, you might be able to select a special response that says "Don't know" or "Refuse to answer". To select a special response, use one of the following methods:

- **For interviews that require the keyboard only.** Press the keyboard shortcut that is shown alongside the special response, that is, Ctrl+1 for the first special response in the list, Ctrl+2 for the second, and so on.
- **For interviews that use the mouse.** Click on the appropriate check box.

To cancel a special response, select the same special response again.

Your answer will usually be rejected if you select a special response in addition to entering an answer, or if you select more than one special response.

Ending a Review

You end a review in one of two ways, either by accepting or rejecting the interview.

Accepting the Interview

This is the usual way to end a review. The status of the interview will be defined as both completed and reviewed. In addition, the call outcome on the participant's sample record will be changed to Reviewed, but the sample record will remain in the COMPLETED queue.

▶ On the left of the main screen, click on the name of the last question so that the last question is displayed.

▶ Click Next or press ENTER.

This accepts the interview and ends the review. Use the options displayed in the center of the main screen to select another interview to review, or click Exit to close the Review Interviews activity.

Note: You might also be able to accept an interview and end the review by clicking the Stop button if one is displayed or by pressing the ESC key.

Rejecting the interview

You can reject the interview if it does not meet your organization's standards. When you reject the interview, the status of the interview will be defined as reviewed, but not completed. In addition, the call outcome on the participant's sample record will be changed to RejectedByReviewer and the sample record will be moved to the UNUSABLE queue.

▶ Click the Reject Interview button as shown below:

Figure 1-61
Reject Interview button

This rejects the interview and ends the review. Use the options displayed in the center of the main screen to select another interview to review, or click Exit to close the Review Interviews activity.

Note: If you changed the answer to the currently displayed question before clicking the Reject Interview button, your new answer will *not* be saved.

Closing Review Interviews

- On the main screen, click the Exit button as shown below:

Figure 1-62
Exit button

Quotas

You use the Quotas activity to check and revise targets or to change the way quotas behave.

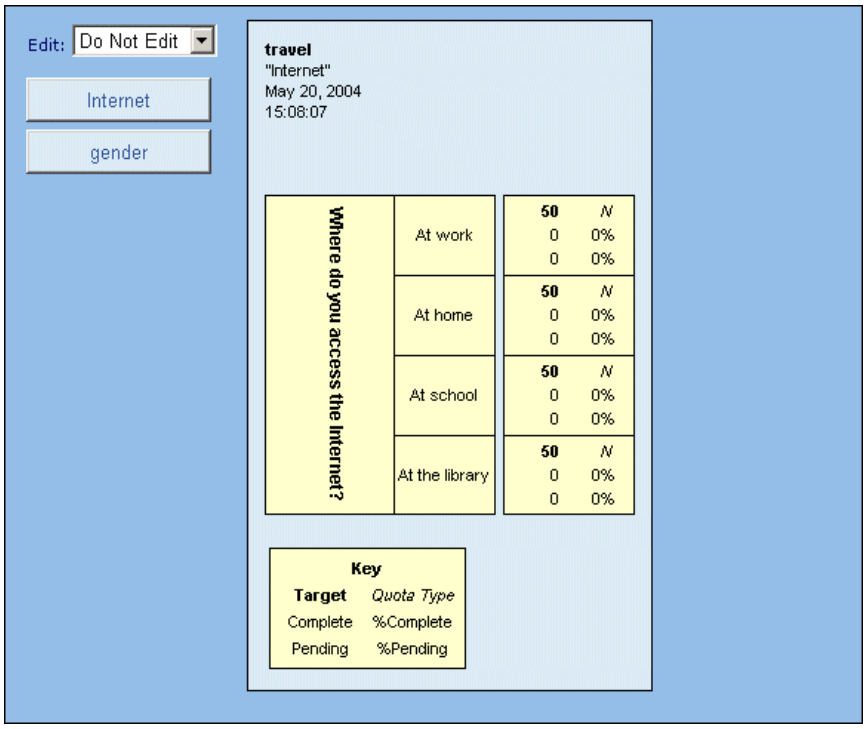
Starting Quotas

- Select the project whose quotas you want to work on and click Quotas.

The page displays a selection button for each quota in the questionnaire (that is, for each quota matrix defined in the project's *.mqd* file) and a drop-down selection list from which you choose the type of changes, if any, that you want to make.

Checking Quotas

When you check quotas, the Quotas activity displays a table showing the current target for each cell, and the number and percentage of completed and pending interviews per cell. You cannot change anything in the table.

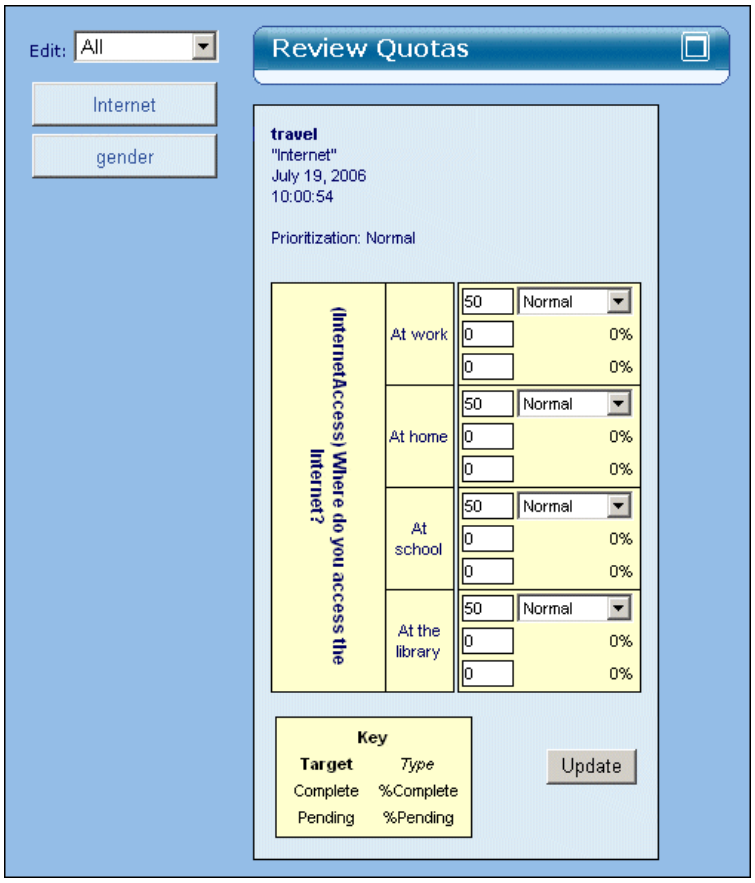


To Check Quotas

- Click the button for the quota whose details you want to see.

Changing Quota Targets , Behavior Flags and/or Cell Priorities

When you select one of the Edit options, you will be able to change the targets and the counts of completed or pending interviews in a cell. If priority pending has been set, you will also be able to change the cell priorities.



Note: The menu points for these options are toggles. Once you select an option it remains selected until you choose a different option or until you leave Quotas. This allows you to make the same type of changes to a number of quotas without having to reselect an option from the menu each time.

To Change Targets and/or Behavior Flags

- Do one of the following:
  - To change targets, choose Target from the Edit selection list.
  - To change targets and/or behavior flags, choose All from the Edit selection list. If the quota uses priority pending you will also be able to change the cell priorities.
- Click the button for the quota you want to change.

  The quota status report is displayed with the values you can change enclosed in boxes.
- Type new values in the boxes. If you are changing the behavior flags, choose one of the following:
  - Normal for a normal quota.
  - Overquota to allow over-quota interviews. This type of quota allows interviewing to continue all the time that the number of completed interviews in this cell is less that the target. Once the target is met, any interviews that are already in progress are allowed to continue and complete,

so it is possible that the final number of completed interviews will slightly exceed the target. Once the target has been met, all new interviews in the cell will fail the quota test and will be dealt with as specified by the scriptwriter (usually the interview will be terminated).

- Counter for a counter quota. This type of quota counts the number of interviews that take place for this cell but does not compare this count against the target (usually, the target is zero). This cell then has no quota control, but a record of the number of interviews achieved for that cell will be maintained.

▶ Click Update to update the quota database.

Note: Any changes that you make are replicated in the quota tables in the database but not in the project's *.mqd* file. If you later reactivate the project and you choose the option to update the quota tables with the information in the *.mqd* file, any changes that you made with Quotas will be overwritten with the information from the *.mqd* file.

Prioritizing Quotas

When a quotas are defined for multiple response categorical questions, the quotas for all responses chosen by the respondent are pended. If the interview is completed, then the corresponding complete counts are incremented. When a respondent chooses more than one response, this results in more than one quota cell being incremented.

Quota prioritization lets you decide how many cells to pend, and allows you to choose the method by which those cells are chosen. There are four possibilities.

- **Priority Pending.** Pend the cell with the highest priority, if this response is chosen. If this response is not chosen, try the cell with the next highest priority, and so on. Cells with no priority defined have the lowest priority of all.
- **Random Pending.** Pend a cell at random from the cells for the responses that have been chosen. If an interview times out and is restarted after a cell has been pended, the same cell will be pended if the interview is restarted. If the questionnaire contains routing or other logic based on the value of the pended cell, this ensures that the interview behavior will be the same whether or not it times out.
- **LeastFull Pending based on the ratio of completes to targets.** Pend the cell that is least full from the cells for the responses that have been chosen. If an interview is restarted after timing out, the LeastFull cell is recalculated using the latest quota information. This may mean that a different cell is pended in the restarted interview to the one that was pended when the interview was originally started. If the questionnaire has routing based on the pended cell, the path through the interview may change once the completed portion of the interview has been replayed.
- **LeastFull Pending based on the number of completes only.** Pend the cell that has the fewest completed interviews for the responses that have been chosen. If an interview is restarted after timing out, the LeastFull cell is recalculated using the latest quota information. This may mean that a different cell is pended in the restarted interview to the one that was pended when the interview was originally started. If the questionnaire has routing based on the pended cell, the path through the interview may change once the completed portion of the interview has been replayed.

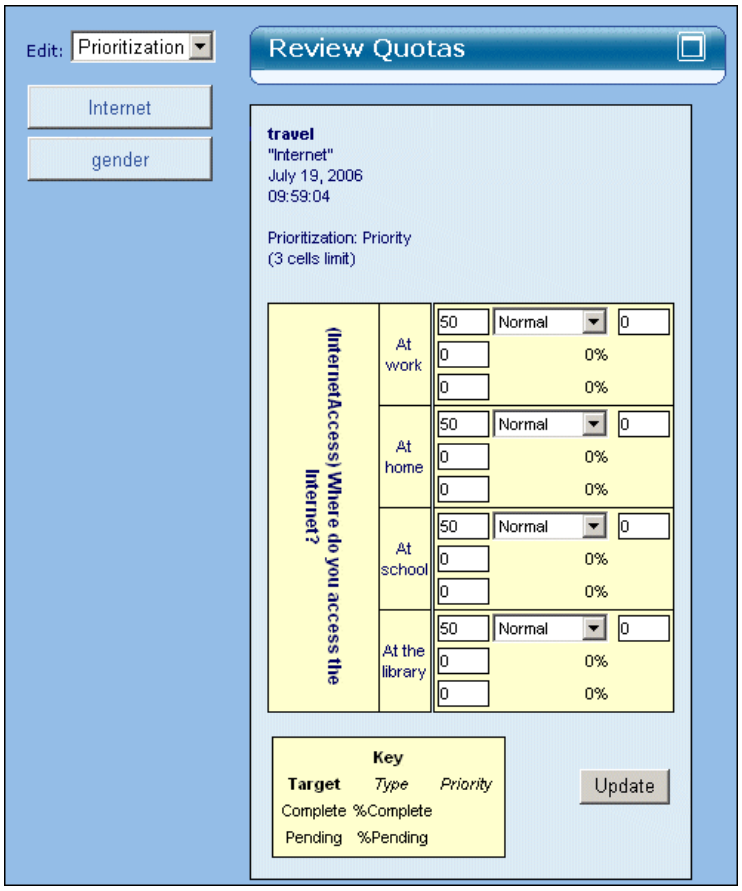
In Quotas, you can set the type of prioritization you want to use and, for priority pending, the relative importance of each cell. Once you have a set the prioritization type you it is not advisable to change it, although you can change the cell priorities for Priority pending if you wish. For more information, see the topic Changing Quota Targets , Behavior Flags and/or Cell Priorities on p. 212.

To Set Priorities

- Click the button for the quota you want to prioritize.
- In the Edit box, choose Prioritization.

  The Prioritization dialog box is displayed.
- In Prioritization, choose the type of prioritization you want to set.
- In Number of cells, type the number of cells you want to prioritize. (This option is not appropriate for Normal prioritization so it is greyed out.)
- Click OK.

  The quota status report is displayed.
- If you chose Priority pending, the right-most box for each cell will contain a number (zero if priority pending has not been set for this cell before). In these boxes, type the relative priority of each cell. For example, type 1 for the cell with the highest priority, 2 for the cell with the next highest priority, and so on.

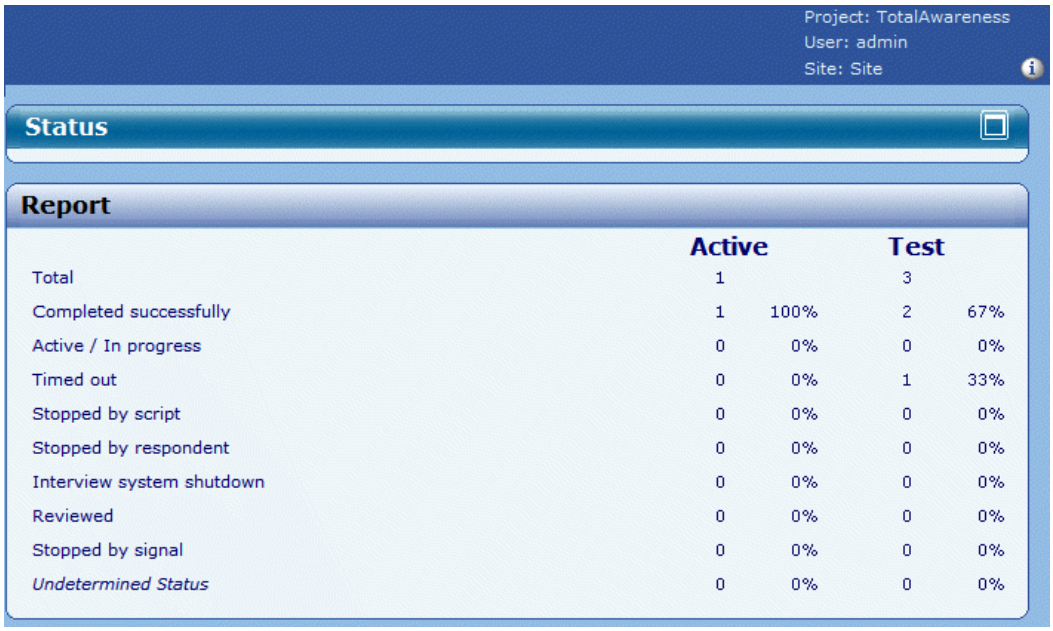


► Click Update to update the quota database.

Note: Any changes that you make are replicated in the quota tables in the database but not in the project's *.mqd* file. If you later reactivate the project and you choose the option to update the quota tables with the information in the *.mqd* file, any changes that you made with Quotas will be overwritten with the information from the *.mqd* file.

Status

You use the Status activity to monitor the current status of a project. The report refreshes automatically every 60 seconds, which is useful if interviews are in progress. For a really up to date report you can request an immediate refresh.



	Active		Test	
Total	1		3	
Completed successfully	1	100%	2	67%
Active / In progress	0	0%	0	0%
Timed out	0	0%	1	33%
Stopped by script	0	0%	0	0%
Stopped by respondent	0	0%	0	0%
Interview system shutdown	0	0%	0	0%
Reviewed	0	0%	0	0%
Stopped by signal	0	0%	0	0%
Undetermined Status	0	0%	0	0%

The report groups interviews using the following status codes:

- **Completed successfully**. Interviews that were successfully completed because respondents answered all questions that applied to them.
- **Active / In progress**. Interviews that are currently in progress.
- **Timed out**. Interviews that timed out before completion. This generally happens when a respondent takes more than ten minutes to answer a question (perhaps he/she is interrupted in the middle of the interview). If the respondent does not close his/her browser, the interview usually restarts when the respondent clicks Next (otherwise, you can restart from the URL). As long as the time-out period has not expired, the status of the interview remains Active. Note: Ten minutes is the default time-out period. Speak to your IBM® SPSS® Data Collection administrator if you regularly see a lot of timed out interviews on all or most of your projects.
- **Stopped by script**. Interviews that were terminated by a `stop` statement in the questionnaire script.
- **Stopped by respondent**. Interviews that were stopped because the respondent clicked the Stop button. If the project does not use Sample Management, interviews in this state cannot be restarted.
- **Interview system shutdown**. Interviews that were terminated due to a problem in the script.
- **Reviewed**. Reserved for future use. This category will count interviews that have been reviewed by replaying them.
- **Stopped by signal**. Interviews that were stopped by a `signal` statement in the questionnaire script.
- **Undetermined status**. Interviews whose data collection status in the project's case data file could not be matched to a valid status in the project's questionnaire definition (*.mdd*) file. You should not see any interviews in this category.

Starting Status

▶ Select the project you want to monitor and click Status.

The page displays a table showing the number of interviews with different outcomes achieved in active and test mode.

Refreshing the Report On Demand

▶ Click the Refresh button.

Survey Results

Survey Results allows you to create simple tables using variables from your interview data. The tables can be simple topline tables showing the number of respondents present in each category of a single variable, or they can be two-dimensional cross-tabulations using one or more variables on the side and top of the table.

Tables can be filtered to include certain categories of respondents only—for example, only women aged between 21 and 30—or to include or exclude interviews that terminated in a particular way—for example, to include all completed interviews or to exclude test interviews.

Survey Results uses the questionnaire definition (*.mdd*) file in the Master project folder and reads the location of the case data from that file. If the *.mdd* file contains more than one version, Survey Results uses the versions labelled LATEST.

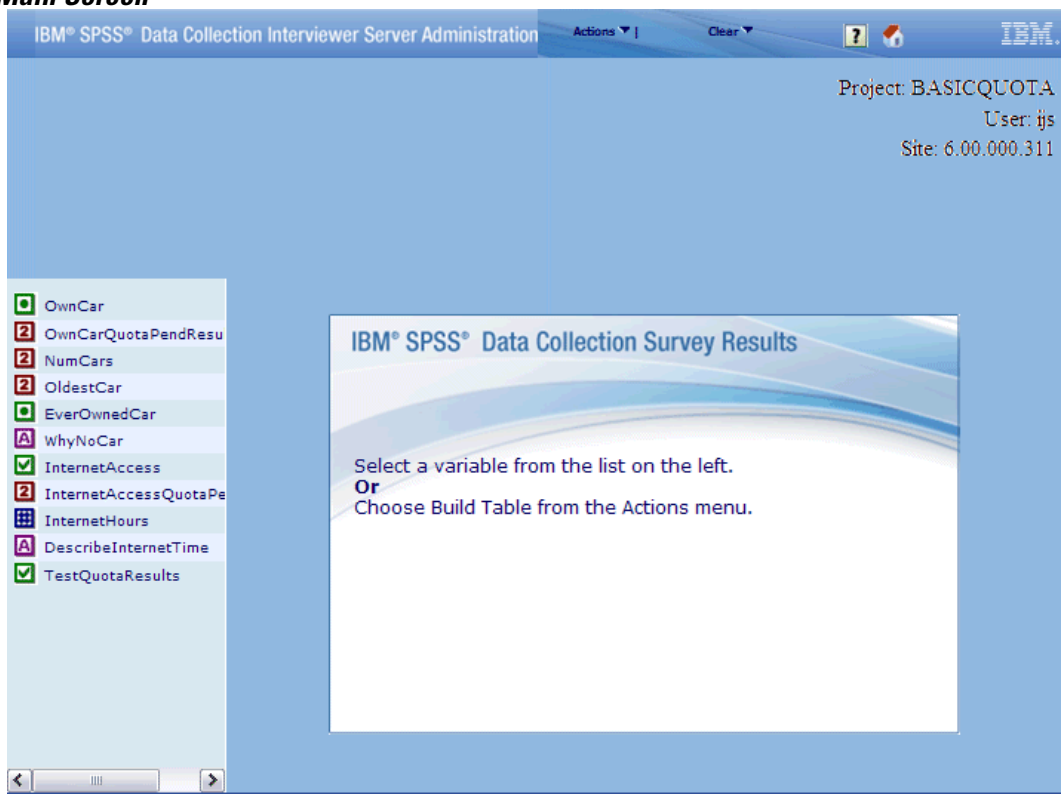
Support for hierarchical data

Starting with version 6, Survey Results supports hierarchical data in the form of unbounded loop questions. Unbounded loop questions are read from the MDM document fields (which include all questions as fields).

Starting Survey Results

▶ Select the project you want to work on and click Survey Results.

The Main Screen



The main Survey Results screen has the following sections:

Question List. A frame on the left of the screen that lists questions and other variables that are present in the database. If you hover over a variable in the list, you will see more information about that variable.

Table Frame. The main part of the screen in which charts and tables are displayed.

You can do any of the following:

- Choose an action from the menu.
- Click on a variable in the Question List to display a table for that variable. For some types of variables a chart is also displayed.
- If there is a table already displayed, you can choose a variable in the Question List and Survey Results will replace the side of the table with the variable you selected. All other aspects of the table are retained.

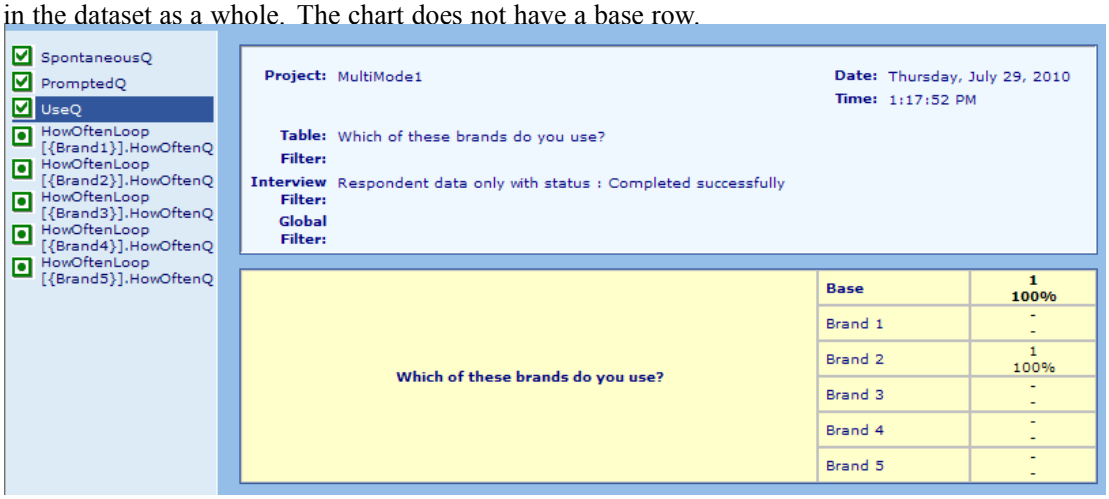
Viewing Variables

You can view information about variables by hovering over the variable's name in the Question List or by selecting the variable in the Question List.

Information About Categorical Variables

If you hover over a categorical variable, a pop-up displays the variable's description and categories.

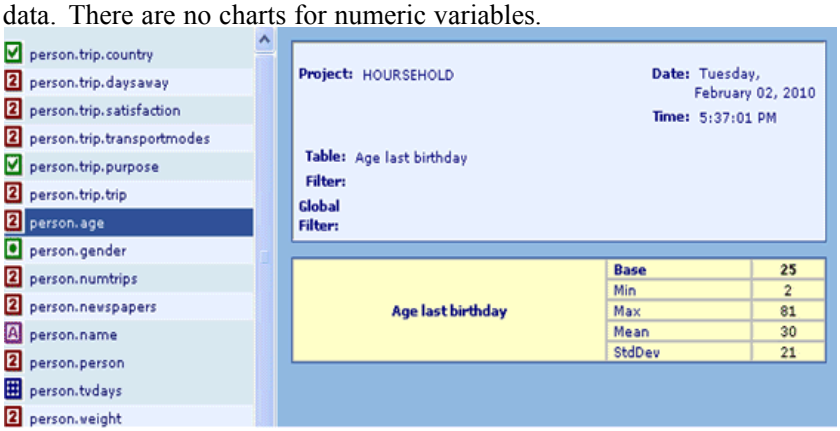
If you select a categorical variable in the Question List, Survey Results displays a table and, if your options request it, a bar chart. The table lists each category with its count of cases and a column percentage showing what proportion the category is of the variable as a whole. The chart has one bar for each category showing the percentage of cases that are present in that category. The percentages are based on the number of cases present in the variable, not the number of cases in the dataset as a whole. The chart does not have a base row.



Information About Numeric Variables

If you hover over a numeric variable, a pop-up displays the variable's description and its minimum and maximum values as they are defined in the questionnaire definition file. If the data was gathered using IBM® SPSS® Data Collection Interviewer Server, these will be the minimum and maximum values defined for the question in the script.

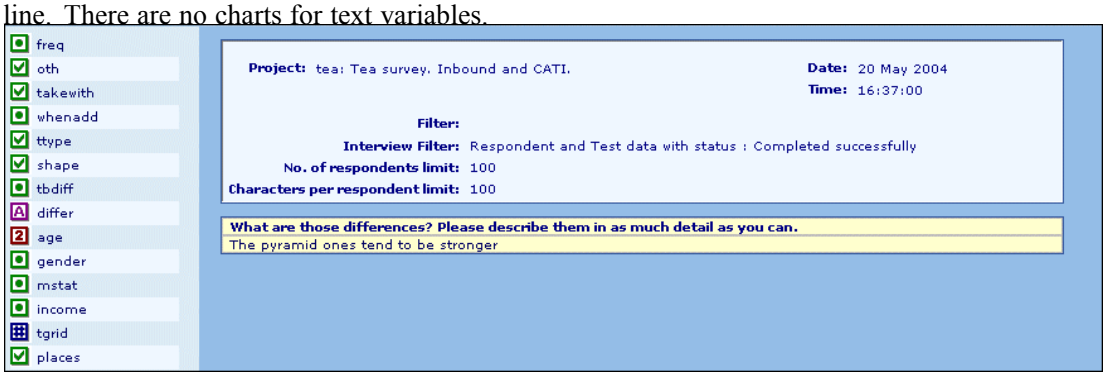
If you select a numeric variable in the Question List, Survey Results displays a table showing the base, mean, minimum, maximum, and standard deviation based on the values found in the data. There are no charts for numeric variables.



Information About Text Variables

If you hover over a text variable, a pop-up displays the variable's description.

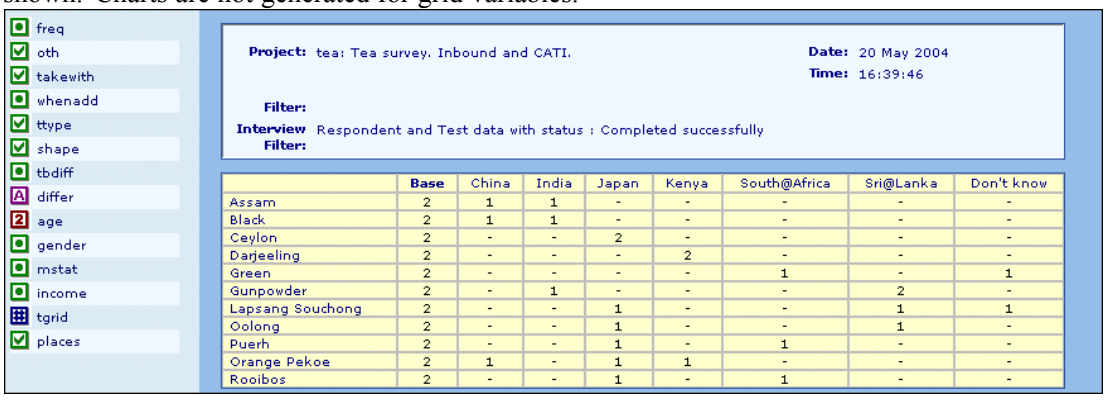
If you select a text variable in the Question List, Survey Results lists the variable's values, one per line. There are no charts for text variables.



Information About Grid Variables

If you hover over a grid variable, a pop-up displays the variable's description.

If you select a grid variable in the Question List, Survey Results displays a table that matches the grid. The grid cells show counts and, depending on the options set in the dialog box and the orientation of the grid, percentages may also be shown. If you choose column percents in the Options dialog box and the grid is vertically oriented, then column percents will also be shown. If you choose row percents and the grid is horizontally oriented, then row percents will also be shown. Charts are not generated for grid variables.



	Base	China	India	Japan	Kenya	South@Africa	Sri@Lanka	Don't know
Assam	2	1	1	-	-	-	-	-
Black	2	1	1	-	-	-	-	-
Ceylon	2	-	-	2	-	-	-	-
Darjeeling	2	-	-	-	2	-	-	-
Green	2	-	-	-	-	1	-	1
Gunpowder	2	-	1	-	-	-	2	-
Lapsang Souchong	2	-	-	1	-	-	1	1
Oolong	2	-	-	1	-	-	1	-
Puerh	2	-	-	1	-	1	-	-
Orange Pekoe	2	1	-	1	1	-	-	-
Rooibos	2	-	-	1	-	1	-	-

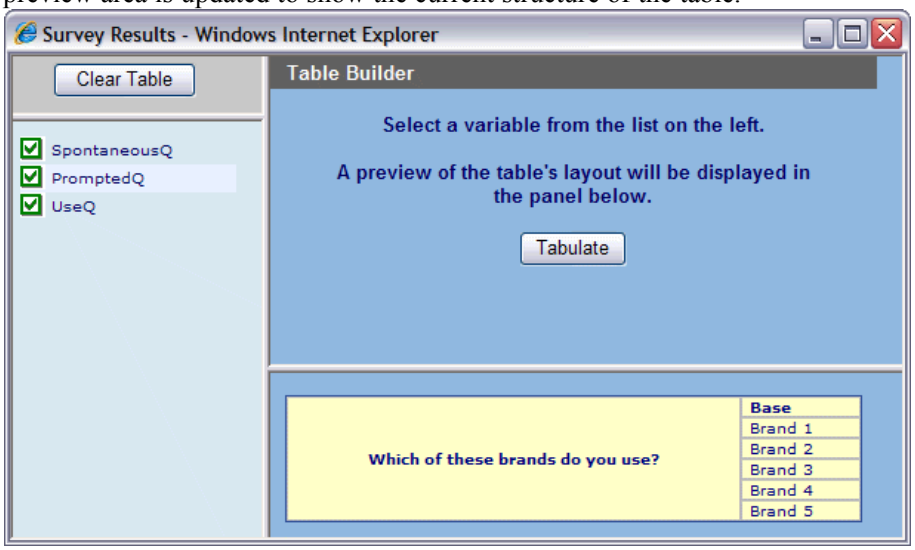
Tables

You can build two-dimensional tables in Survey Results.

If you are building tables while interviews are in progress, there is no need to rebuild the table to include new interviews. Instead, use the Refresh facility to reread the data and update the table, leaving any filters intact.

Building Tables

Build Table creates a table with more than one dimension. It opens a new window in which you select the variables that are to form the rows and columns of the table. As you build the table, the preview area is updated to show the current structure of the table.



When the table is displayed, it has a base row and, by default, the cells of the table show counts and column percentages. Survey Results also shows the name of the project, the date and time it was run and the filter applied at the top of the page.

Categorical Variables

You can place a categorical variable on the top or the side of the table. If you add a categorical variable to an existing table or specification, you may also replace the existing top or side variable with the new variable, or place the new variable to the right of the existing top variable or beneath the existing side variable.

Numeric Variables

You can place a numeric variable on the side of the table and other variables can be placed below it. Numeric variables cannot be placed on the top of the table and once a numeric variable is on the side of a table, you cannot place any variable on the top.

Grid Variables

You can place a grid variable on the side of the table. No further variables can be added to the table.

To Build a Table

- Select
  Actions > Build Table

  This opens the Table Builder window.

- In the Variable List select a variable that you want to use as the side or top of the table.

  Survey Results displays a list of possible positions for that variable in the current table.

- Select the position in which you want to use this variable.

- Continue selecting variables and positions until the table specification is complete. If you make a mistake and want to clear the specification and start again, click Clear Table.

- Click Tabulate.
  The Build Table window closes and the table is displayed on the main screen.

Amending Tables

If you have a table displayed on the main screen and you click on a categorical variable in the Question List, Survey Results replaces the side of that table with the selected variable.

If you choose *Build Table* without clearing the current table, the current table is preserved and you can add to it. If you want to make a completely new table, you must clear the current table first.

Refreshing Table

Refresh Table refreshes the table by rerunning it against the data.

To Refresh the Table

- Select
  Actions > Refresh Table

Clearing Tables

Clear Table clears the current table without cancelling any filters that were applied to the table.

To Clear the Current Table

- Select
  Clear > Clear Table

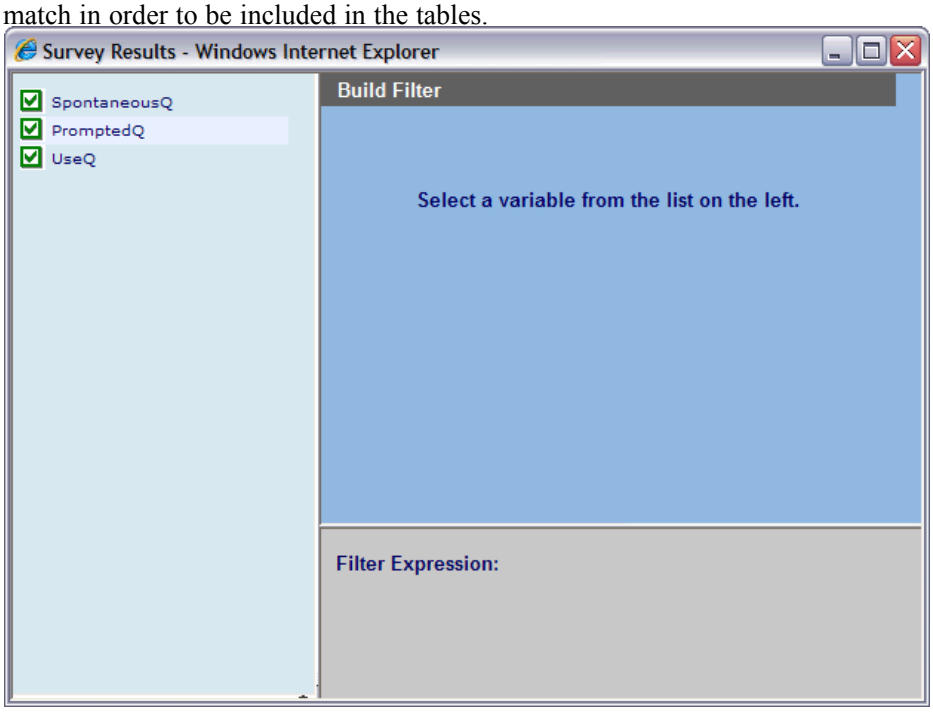
Filters

Filters limit the cases that are summarized in tables by excluding cases that do not match the filter specification. For example, a filter of *Gender=Female* will include women and exclude men and anyone who did not answer the question.

You can also filter tables based on interview status. This allows you to exclude interviews with certain statuses from the tables. For example, you might want to exclude all interviews apart from those that have a completed status.

Building Filters

Build Filter opens a new window in which you select the variables and values that cases must match in order to be included in the tables.



A filter specification consists of three things: a variable name, a logic operator and a value or set of values. The logic operators and the prompt for a response or value vary according to the type of variable you select.

You can define filters based on one or more variables. If the filter is based on more than variable, you can choose whether the individual filters are combined using And or Or logic.

As you build the filter, the Filter Expression panel at the bottom of the window displays the filter text that will appear on the table.

To Build a Filter

- Select
  Actions > Build Filter

  This opens the Build Filter window.

- In the Variable List select a variable that you want to use as a filter.

  Survey Results draws the Build Filter section of the window to suit the type of variable you have chosen.

- In the Logic box select a filter operator.

- In the Respondent(s) box select or enter the response or value that is to be used as the filter.

  As you select responses, the Filter Expression is updated to show the filter condition to be applied.

- Click Apply to close the filter and apply it to the current table. Alternatively, click And>> or Or>> to define an additional filter.

Filtering on a Single Response Variable

Logic operators for single response variables are as follows:

- **Any of these.** Only cases that contain one of the selected answers.
- **None of these.** Only cases that contain none of the selected answers.

Choose an operator and then select one or more filter responses from the list of available responses.

Filtering on a Multiple Response Variable

Logic operators for multiple response variables are as follows:

- **All of these.** Only cases that have all of the selected answers.
- **Any of these.** Cases that contain one or more of the selected answers.
- **None of these.** Only cases that contain none of the selected answers.
- **Exactly these.** Only cases that have the selected answers and no others.

Choose an operator and select one or more filter responses from the list of available responses.

Filtering on a Numeric Variable

Logic operators for numeric variables are:

- Less than
- Greater than
- Equal to
- Not equal to
- Less than or equal to
- Greater than or equal to

Choose an operator and enter the value with which to compare the data.

Filtering on a Text Variable

Logic operators for text variables are:

- Contains
- Does not contain
- Is exactly
- Begins with
- Ends with
- Is blank/empty

If you choose any operator other than *Is blank/empty*, you must enter a text to be used as a filter.

All operators except *Ends with* are case insensitive. With *Ends with*, you must type the text in the same case that it appears in the case data, otherwise the filter will fail.

Filtering on a Grid Variable

The grid is presented already 'sliced' into its various subquestions. Choose the variable that represents the subquestion on which you wish to base your filter. If the variable is a single or multiple choice grid, the slice will be a single or multiple choice variable and you can choose the responses on which to filter. If the grid contains numerics, the logic operators for a numeric are displayed. If the grid contains single or multiple choice responses, the logic operators for those variable types are displayed.

Clearing Filters

Clear Filter removes the filter from the table and refreshes the table so that it is no longer filtered.

To Clear the Current Filter

▶ Select
Clear > Clear Filter

Interview Filters

If you have a suitable dataset, such as a dataset collected in IBM® SPSS® Data Collection Interviewer Server, the Interview Filter option is available. *Interview Filter* lets you include only interviews with certain statuses in tables and charts. The filter is applied before any other filters that you may define, and remains set even if you clear all other filters.

For example, you can set the interview filter to include only interviews that were successfully completed, and can then create a number of tables using case data filters such as age or gender. When you change from the age filter to the gender filter, or cancel case data filtering altogether, the interview filter still applies.

You can change the interview filter during a session and can remove it completely if necessary.

You can filter using the following interview status codes:

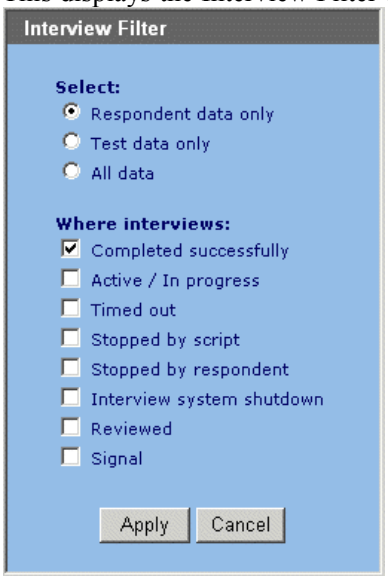
- Completed successfully
- Active/In progress
- Timed out
- Stopped by script
- Stopped by respondent
- Reviewed
- Stopped by signal
- Interview system shut down

You may also choose whether to include only respondent data from live interviews, only test data, or both respondent and test data in the tables.

To Set an Interview Filter

▶ Select
Actions > Intv Filter

This displays the Interview Filter dialog box.



▶ Choose whether to include only respondent data, only test data, or both types of data.

▶ Select the interview statuses that you want to include in the analyses.

▶ Click Apply.

Clearing the Current Table and Filters

Clear All clears the current table and any filters that have been set.

To Clear the Current Table and Filters

▶ Select
Clear > Clear All

Options

Options lets you control how Survey Results works for you. The defaults are as follows:

The Variables section determines which variables are shown in variable lists.

- **Display all system variables.** System variables contain general information about an interview as a whole and include such things as the time at which the interview started and ended, the interview status code, and the interview serial number. Survey Results displays this option only if IncludeSystemVariables is set to True within the metadata document.
- **Display other specify variables.** These variables contain response texts entered using an Other specify response in a single or multiple choice list.
- **Display coding variables.** These variables contain the codes assigned to a question's text and other specify responses during coding.
- **Display source file variables.** These variables contain the names of files containing handwritten or spoken responses for a given question.
- **Display multiplier variables.** These variables contain numeric values associated with specific questions. When cases are counted in a table, the cell counts are normally incremented by 1 for each case present in the cell. If cell counts are to be incremented by a value other than 1, a multiplier variable will exist for the question specifying the value by which cells are to be incremented for each case.

Refer to the IBM® SPSS® Data Collection Developer Library for further information about these variable types. It is available as a free download from *http://www.ibm.com/software/analytics/spss/products/data-collection/*.

The Labels section determines what types of labels are shown and how they are shown.

- You can display variable names or variable labels (the question text).
- You can display variable labels in any language in which the labels exist in the case data.
- The context for which labels are to be displayed should always be *Question*.

Extra choices may appear for some options. These are label types not yet in use.

The Results section determines how your results are displayed. Currently, tables are always displayed even if *Display table* is not selected.

You can set between 0 and 4 decimal places.

If you want to display charts in addition to the table of frequency counts, you may select *Bar*.

The *Text Results* section controls the amount of output displayed for text results. You can choose to display the first 10, 50, 100, 500 responses, or an unlimited number of responses, and to display the first 10, 50, 100, 500 characters, or an unlimited number of characters per response.

To Set Options

- Choose
  Actions > Options

View Log

View Log is an optional facility that displays the action log for the current session. This shows the SQL commands that have been executed to display information about questions and variables selected in the Question frame on the main screen, or to generate tables.

The View Log window also provides buttons for refreshing or clearing the log file.

Note: Logging places an additional overhead on the server and should therefore be used with caution.

To Switch On the View Log Facility

- In Windows Explorer, browse to \Inetpub\wwwroot\SPSSMR\InterviewReporter.
- Right click *Default.aspx* and choose Properties from the pop-up menu.
- On the Properties dialog box, cancel the Read-only attribute and click OK.
- Edit *Default.aspx* using a text editor such as Notepad, and change the setting for LoggingEnabled from False to True.
- Save your changes.

To View the Log File

- Select
  Actions > View Log

To Refresh the Log File

- View the log file and click Refresh.

To Clear the Log File

- View the log file and click Clear.

Troubleshooting

Boxes Instead of Element Texts on the Build Filter Window

Windows 2000 uses codepages to determine how to display characters in different languages. The codepages for each language or language type are different, and characters that appear in one codepage may not be present in another codepage. For example, a Western European codepage may not have all the characters that are required for displaying Japanese texts.

Your computer is set up with a default codepage that corresponds to the language in which you normally work. For example, if your normal language is English, your default codepage will probably be the Western European codepage.

Survey Results HTML pages are encoded using UTF-8 encoding which, in most cases, causes any characters that are not on the default codepage to be displayed correctly. However, on Windows 2000, you may also need to add the project language in which you are working to your regional settings in order for this encoding to process the element texts for categorical filters correctly.

You will know if you have to make this change because when you choose a single or multiple response variable as a filter, the element selection frame will display boxes instead of text for the element labels.

To Add a Language to your Regional Settings

- From the Control Panel select Regional Options.
- On the General tab, in Language Settings for the System, select the language that is being displayed incorrectly.

Phone

Use the Phone activity to produce the following reports for your telephone interviewing project.

For more information about customizing these reports or running them outside of the Phone activity, see the notes at the end of this topic.

Call History Based

The following reports are based on the project's call-history data:

Answer Time Distribution

Busy, Wait, and Idle Time

Busy, Wait, and Idle Time Across Projects

Call Outcome Status

Dialer Statistics

Interviewer Statistics

Interviewer Statistics Across Projects

Silent Call Statistics

Sample Based

The following reports are based on the project's sample data:

Appointments Distribution

Appointments Summary

Call Outcome by Segment

Calls by Segment

Incidence Statistics

Overall Disposition Across Projects

Queue Status

Queue Status by Time Zone

Review Calls

Sample Usage

Sample Usage Across Projects

Time Zone Status

Note that all reports display counts and percentages that are zero as a hyphen (-) and counts and percentages that are rounded to zero as an asterisk (*).

Reports will include charts only if you have enabled the charting feature in IBM® SPSS® Data Collection Interviewer Server. For more information, see the topic Running Reports on p. 253.

The rest of this topic describes the reports in detail.

Answer Time Distribution

For projects that use an autodialer, this report shows a frequency table of the time taken by participants to answer calls. The categories are one second to 20 seconds in one second intervals, with an additional category for durations greater than 20 seconds. Each cell shows a count, a column percentage, and cumulative column percentage.

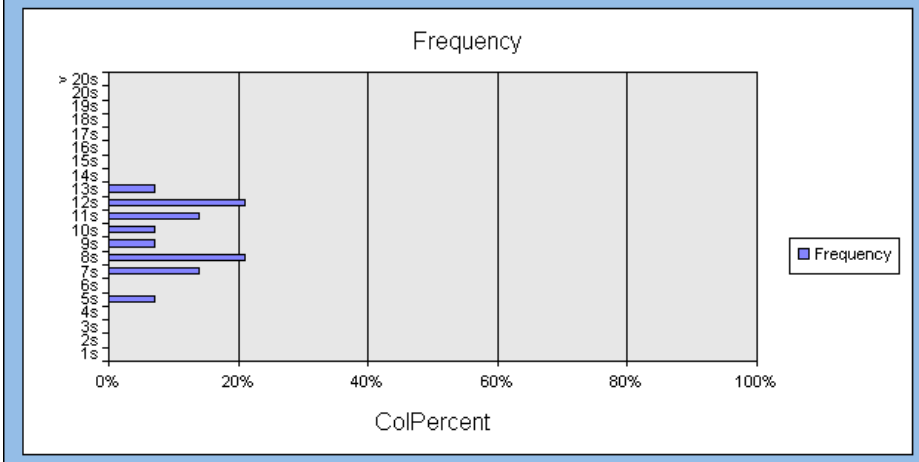
You might want to use the statistics in this report to adjust the minimum length of time that an unanswered phone call must ring before the autodialer terminates the call. However, your local laws might specify the minimum value that you must use. For more information, search the Phone Surveys activity help file for the topic "Autodialer Settings".

Note that this report always includes data for both real and test interviews—you cannot choose to include only one or the other. For projects that do not use an autodialer, selecting this report might display an empty table or an error message.

Answer Time Distribution

Answer time distribution for dialer calls
MYFIRSTINTERVIEW
Data Level Filter:
All interviewers data **AND**
Calls Answered

Base	**14** ***100%*** ***100%***
1s	- - -
2s	- - -
3s	- - -
4s	- - -
5s	1 *7%* *7%*
6s	- - *7%*
7s	2 *14%* *21%*



Busy, Wait, and Idle Time

For projects that use an autodialer, this report shows the busy, wait and idle times for each interviewer who has worked on the project. The definition of these times is as follows:

- **Busy time.** This is when the interviewer is interacting with the participant.

- **Wait time.** This is when the interviewer has clicked the Start Dialing button (in the Phone Participants activity) and is waiting to be connected to a participant.
- **Idle time.** This is when the interviewer can click the Start Dialing button, but has not done so.

Each cell, which corresponds to the busy, wait, or idle time for one interviewer, shows the mean time, the total time, the minimum time, and the maximum time. All times are shown in days, hours, minutes, and seconds.

If you specify a time period when you run the report, the report includes only interviewers who made calls during that time period.

The Busy, Wait, and Idle Time report does not include a chart, even if you have enabled the charting feature.

Note that this report always includes data for both real and test interviews—you cannot choose to include only one or the other. For projects that do not use an autodialer, selecting this report might display an empty table or an error message.

Busy, Wait and Idle Time

Busy, wait and idle time per interviewer
CATISMALL2
Data Level Filter: Real interviews only **AND**
All interviewers data
Filter: Accessed by an interviewer

Cell Contents:
- Mean (Duration)
- Sum (Duration)
- Minimum Value (Duration)
- Maximum Value (Duration)
- Row Percentage (Sum Duration)

Rules:
- Hide rows where the Mean (Duration) is equal to 0

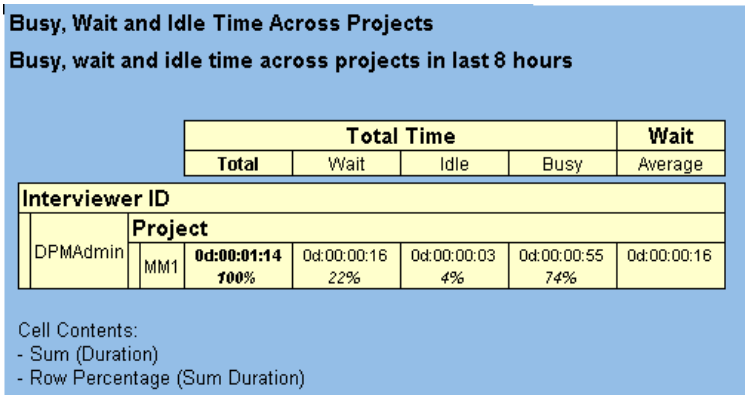
	Interviewer Time		
	Busy Time	Wait Time	Idle Time
Interviewer ID			
Base	**0d:00:04:32** **148d:07:16:56** - **0d:05:48:57** ***76%***	**0d:00:00:54** **28d:17:22:22** - **0d:00:10:03** ***14%***	**0d:00:00:34** **18d:00:30:56** - **0d:06:22:24** ***9%***
admin	0d:00:00:16 0d:00:00:31 0d:00:00:13 0d:00:00:18 *48%*	0d:00:00:22 0d:00:00:22 0d:00:00:22 0d:00:00:22 *34%*	0d:00:00:12 0d:00:00:12 0d:00:00:12 0d:00:00:12 *18%*
BuildUser1	0d:00:03:34 1d:18:45:09 - 0d:00:13:44 *77%*	0d:00:00:52 0d:04:05:51 0d:00:00:05 0d:00:03:02 *17%*	0d:00:00:20 0d:01:35:03 - 0d:00:07:10 *6%*
BuildUser10	0d:00:03:59 1d:18:49:09 0d:00:00:01 0d:00:14:51 *78%*	0d:00:00:51 0d:03:37:47 0d:00:00:08 0d:00:02:48 *15%*	0d:00:00:25 0d:01:48:52 - 0d:00:13:37 *7%*
BuildUser100	0d:00:04:09 0d:08:39:30 - 0d:00:14:22 *73%*	0d:00:00:57 0d:01:52:20 0d:00:00:02 0d:00:02:56 *16%*	0d:00:00:38 0d:01:17:33 - 0d:00:14:35 *11%*

Busy, Wait, and Idle Time Across Projects

This reports provides busy, wait, and idle information across projects for each interviewer and project for the last 8 hours. This report is similar to the Busy, Wait, and Idle Time report, except this report always includes data for both real and test interviews and it cannot specify a time period.

Note: Due to a Microsoft SQL server limitation, this report is limited to a maximum of 128 projects. When working with customers accounts, this report will only include data for projects in the selected customer account.

- **Total.** Total amount of time the interviewer spent working with the project.
- **Wait.** Total amount of time the interviewer waited for the dialer to return a connected respondent.
- **Idle.** Total amount of time between interviewer interactions with the Phone Participants activity (when not speaking to a respondent or waiting).
- **Busy.** Total amount of time spent speaking with respondents.
- **Average.** The average wait time per dialer connection.



Note: Refer to the "Across project reports" topic in the *IBM® SPSS® Data Collection Developer Library* for more detailed information regarding across project reports.

Call Outcome Status

This report shows a frequency table of call outcomes. Each cell shows a count and a column percentage. For projects that use an autodialer, the call outcomes include those selected by the autodialer.

Call Outcome Status

Call outcomes chosen by interviewers
CATISMALL2
Data Level Filter: Real interviews only **AND**
All interviewers data
Filter: Accessed by an interviewer

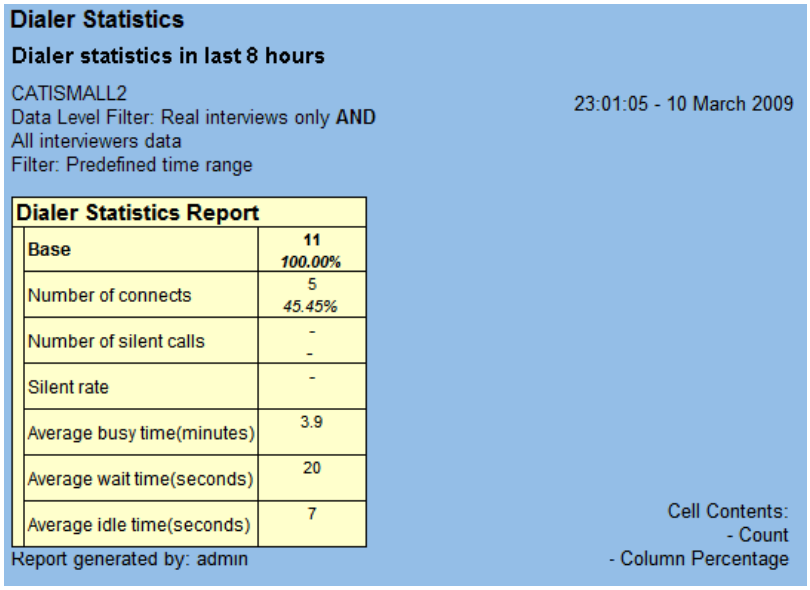
Call Outcome	
Base	**47143** *100%*
Abandoned	12072 *26%*
Canceled	2 *
Completed	14938 *32%*
Dialer busy	2 *
Error during interview	2 *
No_name__	2 *
Reviewed	41 *
Timed out or stopped	20084 *43%*

Report generated by: admin

Dialer Statistics

This report provides dialer specific statistics over the past eight hours.

- **Base.** The total of telephone numbers dialed.
- **Number of connects.** The total number of successful connections. The percentage of successful connections, in relation to the base, is also provided.
- **Number of silent calls.** The total number of silent calls. The percentage of silent calls, in relation to the base, is also provided.
- **Silent rate.** The rate of silent calls in relation to successful connections.
- **Average busy time (minutes).** The average busy time (also known as "talk time") for all interviewers.
- **Average wait time (seconds).** The average wait time for all interviewers.
- **Average idle time (seconds).** The average idle time for all interviewers.



Dialer Statistics

Dialer statistics in last 8 hours

CATISMALL2
Data Level Filter: Real interviews only **AND**
All interviewers data
Filter: Predefined time range

23:01:05 - 10 March 2009

Dialer Statistics Report

Base	**11** *100.00%*
Number of connects	5 *45.45%*
Number of silent calls	- -
Silent rate	-
Average busy time(minutes)	3.9
Average wait time(seconds)	20
Average idle time(seconds)	7

Report generated by: admin

Cell Contents:
- Count
- Column Percentage

Interviewer Statistics

This report contains two tables. The first is a crosstabulation that shows, for each interviewer, the total time that the Phone Participants activity was open ("Session Time"), the total number of calls made ("Attempts"), and the number of calls that resulted in each of the following groups of call outcomes. The report always includes both real and test data.

Column name	Call outcomes included in this group
Completes	EarlyComplete, Completed
Terminates	Stopped, OverQuota, FailedScreener
System Terminates	Failed, Fax, WrongNumber, Disconnected, CellPhone, BusinessNumber, FastBusy, PossibleWrongNumber, DialerFailed, Silent, NotAvailable
Other Terminates	Abandoned, LanguageBarrier, TransferToWeb
Recalls	Appointment, NoAnswer, AnswerMachine, Busy, LanguageRecall, Rejected, NetworkBusy, DialerBusy, Unknown
Refusals	Refused
Reviewed Interviews	Reviewed
Cancels	Canceled

For each column, each cell contains a count and a row percentage. Note that the number of calls includes multiple calls to the same participant.

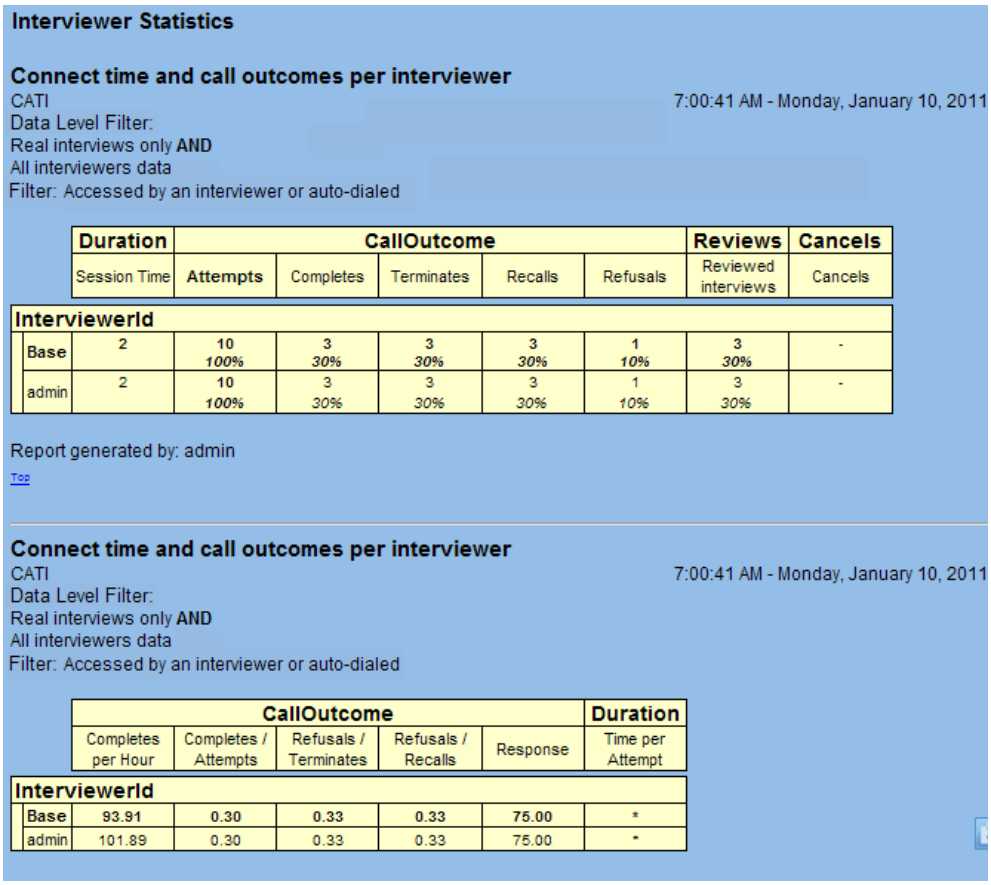
For projects that use an autodialer, the Terminates and Recalls columns include call outcomes selected by the autodialer. Autodialed calls that did not result in a connection (for example, unanswered calls that were returned to the RECALL queue) are shown against an interviewer ID called "__Autodial", whose figures are included in the Base statistics.

The second table shows some additional statistics for each interviewer, as follows:

- **Completes per hour.** This shows the average number of calls made during each hour of connect time that resulted in a call outcome in the Completes group. If the total connect time is less than one hour, this figure shows the number of calls that would be made in one hour if the interviewer continued at the same rate.
- **Completes/Attempts.** This shows the ratio (as a decimal between zero and one) of the number of calls that resulted in a call outcome in the Completes group compared with the total number of calls.
- **Refusals/Terminates.** This shows the ratio (as a decimal between zero and one) of the number of calls that resulted in a call outcome in the Refusals group compared with the number of calls that resulted in a call outcome in the Terminates group.
- **Refusals/Recalls.** This shows the ratio (as a decimal between zero and one) of the number of calls that resulted in a call outcome in the Refusals group compared with the number of calls that resulted in a call outcome in the Recalls group.
- **Response.** This shows the ratio (as a percentage) of the number of calls that resulted in a call outcome in the Completes group compared with the number of calls that resulted in a call outcome in either the Completes or Refusals groups.
- **Time per Attempt.** This shows the average time in minutes of each call, that is, the total connect time divided by the total number of calls.

If the you specify a time period when you run the report, the report includes only interviewers who made calls during that time period.

Note that the Interviewer Statistics report does not include a chart, even if you have enabled the charting feature.



Interviewer Statistics

Connect time and call outcomes per interviewer

CATI 7:00:41 AM - Monday, January 10, 2011
Data Level Filter:
Real interviews only **AND**
All interviewers data
Filter: Accessed by an interviewer or auto-dialed

	Duration	CallOutcome					Reviews	Cancels
	Session Time	Attempts	Completes	Terminates	Recalls	Refusals	Reviewed interviews	Cancels
InterviewerId								
Base	2	10 100%	3 30%	3 30%	3 30%	1 10%	3 30%	-
admin	2	10 100%	3 30%	3 30%	3 30%	1 10%	3 30%	-

Report generated by: admin
Top

Connect time and call outcomes per interviewer

CATI 7:00:41 AM - Monday, January 10, 2011
Data Level Filter:
Real interviews only **AND**
All interviewers data
Filter: Accessed by an interviewer or auto-dialed

	CallOutcome					Duration
	Completes per Hour	Completes / Attempts	Refusals / Terminates	Refusals / Recalls	Response	Time per Attempt
InterviewerId						
Base	93.91	0.30	0.33	0.33	75.00	*
admin	101.89	0.30	0.33	0.33	75.00	*

Interviewer Statistics Across Projects

This report provides interviewer productivity information across projects for each interviewer and each project for the last 8 hours. The report always includes both real and test data.

Note: Due to a Microsoft SQL server limitation, this report is limited to a maximum of 85 projects. When working with customers accounts, this report will only include data for projects in the selected customer account.

- **Session time.** Amount of time (minutes) that the interviewer was logged into the project.
- **Dials.** Total number of participant records dialed.
- **Dials per hour.** Number of participant records dialed per hour.
- **Completes.** Total number of completed interviews.
- **Completes per hour.** Number of completed interviews per hour.
- **Appointments.** Total number of scheduled appointments.
- **Refusals.** Total number of refusals.

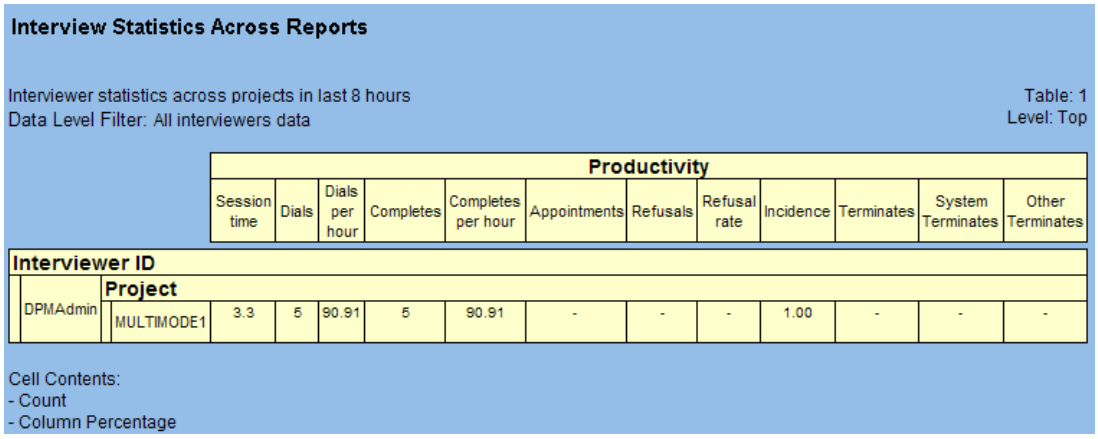
- **Refusal Rate.** Number of refusals the interviewer encountered tor the project divided by the number of potential respondents screened (as defined in the denominator section for Incidence).
- **Incidence.** As defined by CASRO (Council of American Survey Research Organizations) standards:

  – **The calculation for net incidence:** Number of potential respondents screened and eligible or qualified who agree to participate divided by the number of potential respondents screened.

  – **The numerator:** Number of potential respondents screened and eligible or qualified who agree to participate includes all contacts who have not been screened out by the screener section of the interview and who have not refused to participate.

  – **The denominator:** Number of potential respondents screened; includes all attempts made that resulted in contact with the respondent wherein the eligibility of the contact to participate can be evaluated. Thus, no answers, hangups, fax, modem, tritones, not home, busies are all excluded from this calculation.

  In practice, the numerator contains the respondents where the Screener participants field is set to **Passed** while the denominator contains the respondents where the Screener field is either **Passed** or **Failed**. Respondents whose eligibility cannot be evaluated will have **Null** in the Screener field. The Screener field is defined in the interview script. For more information, see the topic Mapping Fields to Required Columns in the Sample Table on p. 84.
- **Terminates.** Total number of interviews terminated as a result of the call outcome **Stopped**, **OverQuota**, or **FailedScreener**.
- **System Terminates.** Total number of interviews terminated as a result of the call outcome **Failed**, **Fax**, **WrongNumber**, **Disconnected**, **CellPhone**, **BusinessNumber**, **FastBusy**, **PossibleWrongNumber**, **DialerFailed**, **Silent**, or **NotAvailable**.
- **Other Terminates.** Total number of interviews terminated as a result of the call outcome **Abandoned**, **LanguageBarrier**, or **TransferToWeb**.



Interview Statistics Across Reports

Interviewer statistics across projects in last 8 hours
Data Level Filter: All interviewers data

Table: 1
Level: Top

			Productivity										
			Session time	Dials	Dials per hour	Completes	Completes per hour	Appointments	Refusals	Refusal rate	Incidence	Terminates	System Terminates	Other Terminates
Interviewer ID														
	Project													
DPMAdmin		MULTIMODE1	3.3	5	90.91	5	90.91	-	-	-	1.00	-	-	-

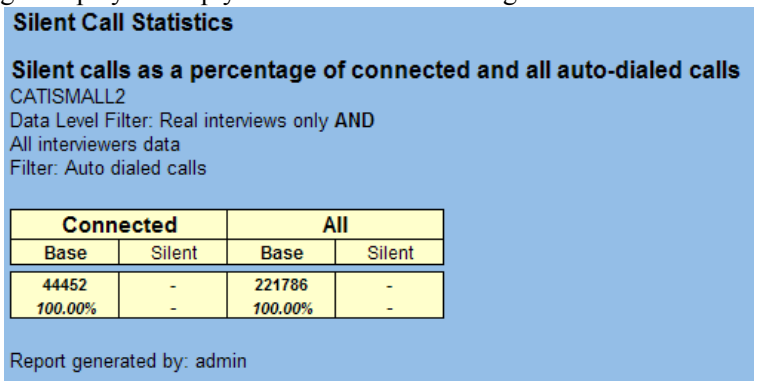
Cell Contents:
- Count
- Column Percentage

Note: Refer to the "Across project reports" topic in the *Data Collection Developer Library* for more detailed information regarding across project reports.

Silent Call Statistics

For projects that use an autodialer, this report can be used to compare the number of "silent calls" with both the number of calls that were answered by participants (shown as "Connected" calls) and the total number of calls made by the autodialer. Silent calls can occur when an autodialer generates more connected calls than there are interviewers available to handle the calls. Each cell of the report shows a count and a row percentage.

Note that this report always includes data for both real and test interviews—you cannot choose to include only one or the other. For projects that do not use an autodialer, selecting this report might display an empty table or an error message.



Silent Call Statistics

Silent calls as a percentage of connected and all auto-dialed calls
CATISMALL2
Data Level Filter: Real interviews only **AND**
All interviewers data
Filter: Auto dialed calls

Connected		All	
Base	Silent	Base	Silent
44452 *100.00%*	- -	221786 *100.00%*	- -

Report generated by: admin

Appointment Distribution

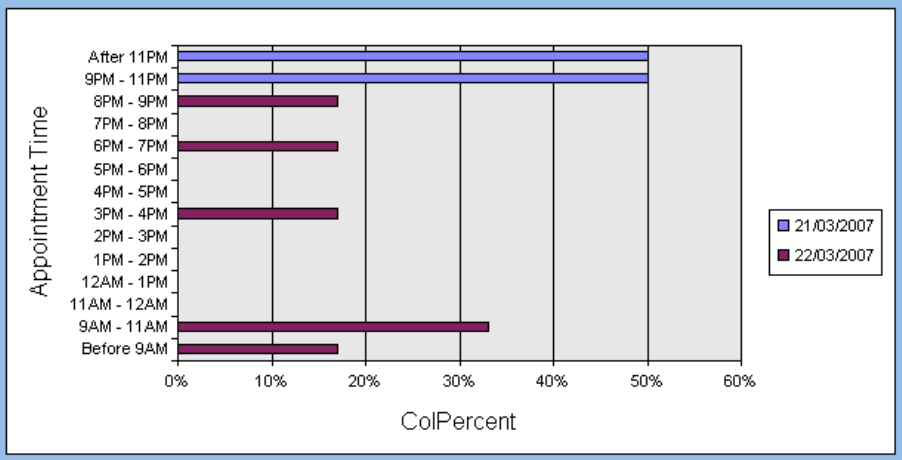
This report shows a frequency table of appointments arranged for the next two days. The categories are 09:00 to 23:00 in one hour intervals, with two additional categories for appointments taking place before 09:00 and after 23:00. Each cell shows a count and a column percentage.

Appointment Distribution

Appointment distribution for the next 2 days

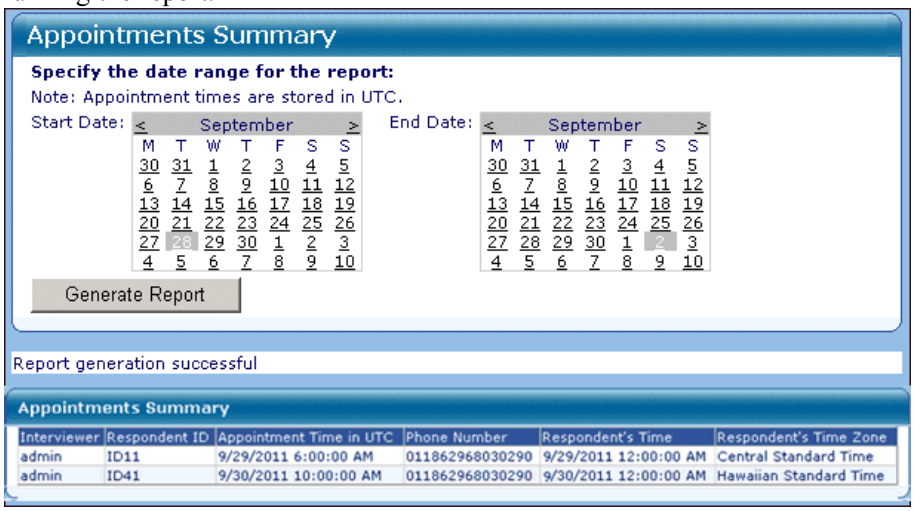
CATISMALL2
Data Level Filter: Real interviews only **AND**
All interviewers data
Filter:
Appointment Queue **AND**
Appointment set for today or tomorrow

	Base	21/03/2007	22/03/2007
Appointment Time			
Base	**8** ***100%***	**2** ***100%***	**6** ***100%***
Before 9AM	**1** ***13%***	- -	1 *17%*
9AM - 11AM	**2** ***25%***	- -	2 *33%*
11AM - 12AM	- -	- -	- -
12AM - 1PM	- -	- -	- -
1PM - 2PM	- -	- -	- -
2PM - 3PM	- -	- -	- -
3PM - 4PM	**1** ***13%***	- -	1 *17%*
4PM - 5PM	- -	- -	- -
5PM - 6PM	- -	- -	- -
6PM - 7PM	**1** ***13%***	- -	1 *17%*
7PM - 8PM	- -	- -	- -
8PM - 9PM	**1** ***13%***	- -	1 *17%*
9PM - 11PM	**1** ***13%***	1 *50%*	- -
After 11PM	**1** ***13%***	1 *50%*	- -



Appointments Summary

Lists all appointments arranged for a particular time period. You specify the time period before running the report.



Call Outcome by Segment

A crosstabulation showing the number of calls for each combination of Queue (the rows in the table) and Call Outcome (the columns). Each cell contains a count and a column percentage. For projects that use an autodialer, the call outcomes include those selected by the autodialer, and the table includes the autodialer-specific queues called CHECK_NUMBER and SILENT.

If the project's sample table contains segment information, the data is further broken down by segment. For more information, see the topic About Segments on p. 260. The example report below shows the data broken down by location, which is one of the segments that the Phone activity recognizes.

Call Outcome by Segment

Call outcomes by Queue and Segment

CATISMALL2
Data Level Filter: Real interviews only **AND**
All interviewers data
Filter: Accessed by an interviewer or auto-dialed

3:21:28 PM - Wednesday, May 04, 2011

	Queue							
	Base	Active	Completed	MAX_TRIES	Recall	Stopped	Timed out	Unusable
Call Outcome								
Base	**113759** ***100%***	**504** ***100%***	**14906** ***100%***	**17917** ***100%***	**37028** ***100%***	**19877** ***100%***	**77** ***100%***	**23450** ***100%***
Abandoned	**11992** ***11%***	- -	- -	- -	- -	- -	- -	11992 *51%*
Busy	**22448** ***20%***	113 *22%*	- -	12040 *67%*	10295 *28%*	- -	- -	- -
Canceled	**3** *	2 *	- -	- -	- -	1 *	- -	- -
Completed	**14863** ***13%***	1 *	14862 *100%*	- -	- -	- -	- -	- -
Dialer busy	**22065** ***19%***	246 *49%*	1 *	- -	21818 *59%*	- -	- -	- -
Dialer error	**1** *	- -	- -	- -	1 *	- -	- -	- -
No_name__	**2** *	- -	2 *	- -	- -	- -	- -	- -
No answer	**10861** ***10%***	70 *14%*	- -	5877 *33%*	4914 *13%*	- -	- -	- -
Reviewed	**41** *	- -	41 *	- -	- -	- -	- -	- -
Timed out or stopped	**20025** ***18%***	72 *14%*	- -	- -	- -	19876 *100%*	77 *100%*	- -
Wrong number	**11458** ***10%***	- -	- -	- -	- -	- -	- -	11458 *49%*

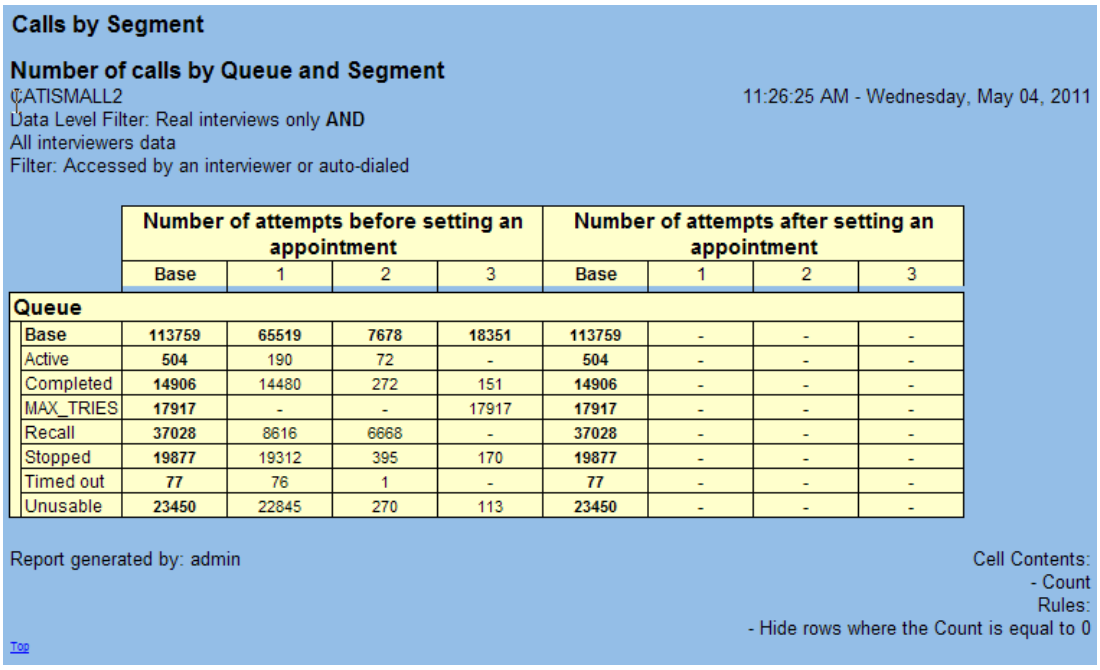
Report generated by: admin

Cell Contents:
- Count
- Column Percentage
Rules:
- Hide rows where the Count is equal to 0
- Hide columns where the Count is equal to 0

Calls by Segment

This report shows, for each queue, the frequency of the number of attempts required to contact participants. The first set of categories, from one attempt to three attempts, excludes attempts made after arranging an appointment. The second set of categories, also from one attempt to three attempts, includes only attempts made after arranging an appointment. Participants requiring more than three attempts are not shown separately, but are included in the base statistics. For projects that use an autodialer, the report includes the autodialer-specific queues called CHECK_NUMBER and SILENT.

If the project's sample table contains segment information, the data is further broken down by segment. For more information, see the topic About Segments on p. 260. The example report below shows the data broken down by location, which is one of the segments that the Phone activity recognizes.



Calls by Segment

Number of calls by Queue and Segment

ATISMALL2

11:26:25 AM - Wednesday, May 04, 2011

Data Level Filter: Real interviews only **AND**
All interviewers data
Filter: Accessed by an interviewer or auto-dialed

	Number of attempts before setting an appointment				Number of attempts after setting an appointment			
	Base	1	2	3	Base	1	2	3
Queue								
Base	**113759**	**65519**	**7678**	**18351**	**113759**	-	-	-
Active	**504**	190	72	-	**504**	-	-	-
Completed	**14906**	14480	272	151	**14906**	-	-	-
MAX_TRIES	**17917**	-	-	17917	**17917**	-	-	-
Recall	**37028**	8616	6668	-	**37028**	-	-	-
Stopped	**19877**	19312	395	170	**19877**	-	-	-
Timed out	**77**	76	1	-	**77**	-	-	-
Unusable	**23450**	22845	270	113	**23450**	-	-	-

Report generated by: admin

Cell Contents:
- Count
Rules:
- Hide rows where the Count is equal to 0

Top

Incidence Statistics

This report provides an industry standard calculation for incidence. CASRO (Council of American Survey Research Organizations) defines incidence as the number of potential respondents screened and eligible or qualified who agree to participate divided by the number of potential respondents screened.

- The numerator is the number of potential respondents screened and eligible, or qualified, who agree to participate. This includes all contacts who have not been screened-out by the screener section of the interview and who have not refused to participate.
- The denominator in the number of potential respondents screened, including all attempts made that resulted in contact with the respondent, wherein the eligibility of the contact to participate can be evaluated. As a result, no answers, hang-ups, fax, modem, tri-tones, not home, and busy signals are all excluded from the calculation.

Incidence is a significant factor in calculating the project cost and in monitoring call center performance.

Note: The sample table must contain the **Screener** field in order for the incidence calculation to occur. Refer to the "Sample Table" topic in the Data Collection Developer Library for more information on the **Screener** field.

Incidence Statistics

Interviewer statistics and sample distribution

TEST1
Data Level Filter:
Real interviews only **AND**
Sample based

9:11:45 PM - Friday, 14 August 2009

	Interviewer ID			
	Base	dpmadmin	Karen_Hardie	todd
Incidence				
Base	- -	- -	- -	- -
Incidence	- -	- -	- -	- -
Sample Distribution				
Base	59 100%	6 100%	9 100%	3 100%
Fresh sample	41 69%	- -	- -	- -
Abandoned	1 2%	- -	1 11%	- -
Answering machine	- -	- -	- -	- -
Appointment	2 3%	- -	1 11%	1 33%
Business	- -	- -	- -	- -
Busy	2 3%	1 17%	1 11%	- -
Canceled	- -	- -	- -	- -
Cell phone	2 3%	- -	2 22%	- -
Completed	6 10%	3 50%	2 22%	1 33%
Dialer busy	- -	- -	- -	- -
Dialer error	- -	- -	- -	- -
Disconnected	- -	- -	- -	- -
Early complete	- -	- -	- -	- -
Error during interview	- -	- -	- -	- -
Failed screener	- -	- -	- -	- -
Fast busy	- -	- -	- -	- -
Fax	- -	- -	- -	- -
Language barrier	1 2%	- -	- -	1 33%
Language recall	- -	- -	- -	- -
Network busy	- -	- -	- -	- -
No answer	1 2%	- -	1 11%	- -
Not available	- -	- -	- -	- -
Over quota	- -	- -	- -	- -
Possible wrong number	- -	- -	- -	- -
Refused	3 5%	2 33%	1 11%	- -
Rejected	- -	- -	- -	- -
Silent	- -	- -	- -	- -
Timed out or stopped	- -	- -	- -	- -
Transfer to web	- -	- -	- -	- -
Unknown	- -	- -	- -	- -
Wrong number	- -	- -	- -	- -

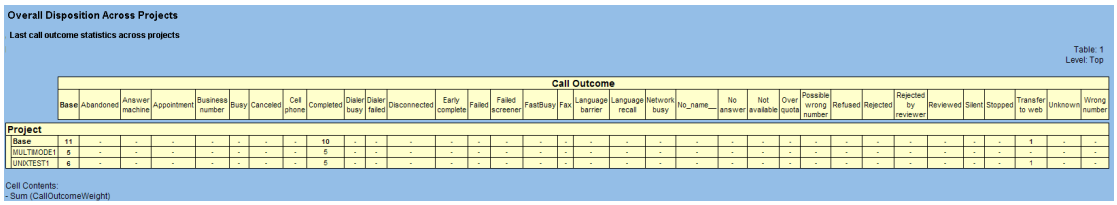
Report generated by: dpmadmin

Cell Contents:
- Count
- Column Percentage

Overall Disposition Across Projects

This report displays the last call outcome across projects for each participant record, organized by project, and always includes both real and test data. The report does not filter data, and does not specify a time period.

Note: Due to a Microsoft SQL server limitation, this report is limited to a maximum of 256 projects. When working with customers accounts, this report will only include data for projects in the selected customer account.



Overall Disposition Across Projects

Last call outcome statistics across projects

Table: 1
Level: Top

	Call Outcome																																
	Base	Abandoned	Answer machine	Appointment	Business number	Busy	Canceled	Cell phone	Completed	Dialer busy	Dialer failed	Disconnected	Early complete	Failed	Failed screener	FastBusy	Fax	Language barrier	Language recall	Network busy	No_name_	No answer	Not available	Over quota	Possible wrong number	Refused	Rejected	Rejected by reviewer	Reviewed	Silent	Stopped	Transfer to web	Unknown	Wrong number
Project																																		
Base	11	-	-	-	-	-	-	-	10	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	1	-	-
MULTIMODE1	5	-	-	-	-	-	-	-	5	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
UNIXTEST1	6	-	-	-	-	-	-	-	5	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	1	-	-

Cell Contents:
- Sum (CallOutcomeWeight)

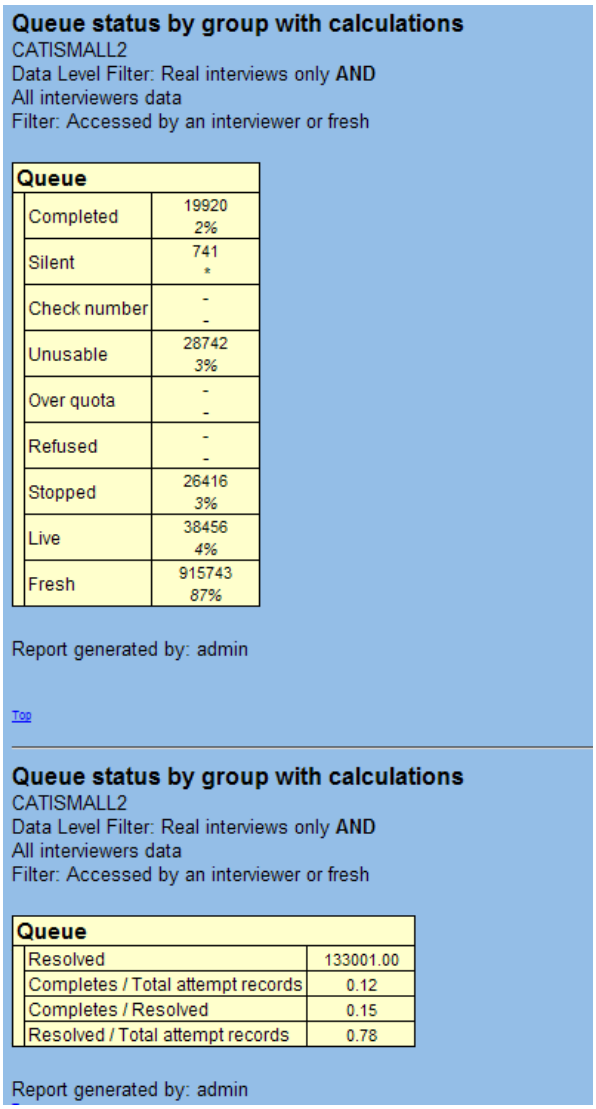
Note: Refer to the "Across project reports" topic in the *Data Collection Developer Library* for more detailed information regarding across project reports.

Queue Status

This report shows two tables. The first is a frequency table showing the number of participant records in each queue. Note that the FAILED queue is not included in this table. For projects that use an autodialer, this table includes the autodialer-specific queues called CHECK_NUMBER and SILENT.

The second table shows some additional statistics, as follows:

- **Resolved.** This shows the number of participant records that are *not* in the ACTIVE, APPOINTMENT, RECALL, TIMED_OUT, TRANSFER_TO_WEB, or FRESH queues.
- **Completes / Total attempt records.** This shows the ratio (as a decimal between zero and one) of the number of participant records in the COMPLETED queue compared with the number of records that are *not* in the FRESH queue.
- **Completes / Resolved.** This shows the ratio (as a decimal between zero and one) of the number of participant records in the COMPLETED queue compared with the number of records that are Resolved, as defined above.
- **Resolved / Total attempt records.** This shows the ratio (as a decimal between zero and one) of the number of participant records that areResolved, as defined above, compared with the number of records that are *not* in the FRESH queue.



Queue status by group with calculations
CATISMALL2
Data Level Filter: Real interviews only **AND**
All interviewers data
Filter: Accessed by an interviewer or fresh

Queue	
Completed	19920 *2%*
Silent	741 *
Check number	- -
Unusable	28742 *3%*
Over quota	- -
Refused	- -
Stopped	26416 *3%*
Live	38456 *4%*
Fresh	915743 *87%*

Report generated by: admin

Top

Queue status by group with calculations
CATISMALL2
Data Level Filter: Real interviews only **AND**
All interviewers data
Filter: Accessed by an interviewer or fresh

Queue	
Resolved	133001.00
Completes / Total attempt records	0.12
Completes / Resolved	0.15
Resolved / Total attempt records	0.78

Report generated by: admin

Queue Status By Time Zone

This report displays the queue status for each available time zone. The queue status can help a supervisor decide how many participant records are available and what can be done to make more records available.

- **Base.** The total number of participant records.
- **Completed.** Interviews that have been completed on the participant records.
- **Unusable.** Participant records that have been called and found to be unusable. Records in this group require effort, beyond a change in a supervisor setting, to become usable. This includes records past their expiration time or records that are set to be recalled beyond their expiration time.
- **Refused.** Participant records are active, but can only be retrieved by refusal converters.

- **Active** Participant records that have been called at least once, but are still available for dialing on online surveying.
- **Fresh.** Participant records that have not been called and are available for dialing.
- **Pre-load.** Participant records that have not been used, but are not available due to their queue.
- **Reached call limit.** Participant records that are currently unusable but could be brought back by changing the call limit (MaxTries). Note that this group must take into account Day Parts if they are in effect.

Queue Status By Time Zone

Queue status crossed with time zone
CATISMALL2
Data Level Filter: Real interviews only **AND**
All interviewers data
Filter:
Accessed by an interviewer or fresh **AND**
timezoneFilter

12:56:54 PM - Wednesday, May 04, 2011

	Queue							
	Base	Completed	Unusable	Refused	Active	Fresh	Pre-load	Reached call limit
Time Zone								
Base	**1050000** ***100%***	**19920** ***100%***	**29488** ***100%***	- -	**64872** ***100%***	**915743** ***100%***	- -	**19977** ***100%***
(GMT) Greenwich Mean Time : Dublin, Edinburgh, Lisbon, London (85)	**417774** ***40%***	7964 *40%*	11870 *40%*	- -	25616 *39%*	364203 *40%*	- -	8121 *41%*
(GMT+01:00) Belgrade, Bratislava, Budapest, Ljubljana, Prague (95)	**83475** ***8%***	1563 *8%*	2226 *8%*	- -	5073 *8%*	73178 *8%*	- -	1435 *7%*
(GMT+01:00) Brussels, Copenhagen, Madrid, Paris (105)	**310191** ***30%***	6020 *30%*	8613 *29%*	- -	19428 *30%*	270221 *30%*	- -	5909 *30%*
(GMT+01:00) Amsterdam, Berlin, Bern, Rome, Stockholm, Vienna (110)	**178920** ***17%***	3302 *17%*	5107 *17%*	- -	10968 *17%*	156093 *17%*	- -	3450 *17%*
(GMT+02:00) Bucharest (115)	**59640** ***6%***	1071 *5%*	1672 *6%*	- -	3787 *6%*	52048 *6%*	- -	1062 *5%*

Report generated by: admin

Cell Contents:
- Count
- Column Percentage

Top

Review Calls

Cross tabulates the data in two columns of the history table to produce a calling profile. Variables that you can use in the tabulation are Queue, TryCount, UserId, and CallOutcome. As an example, a table of UserId by CallOutcome will show one row for each interviewer and one column for each call outcome code. The cell for an individual interviewer and call outcome combination will tell you how many calls that interviewer made that resulted in that call outcome. It will also show the total and mean amount of time that the interviewer spent on those calls.

Note that if you use the Email activity on a project that allows telephone interviewing, the history table for the project will contain a history record for all participants who received the message. These records have an empty UserId value and a duration of either 1 or 0, and they appear in the base of your tables.

Call information crosstabulation. Horizontal axis - TryCount, Vertical axis - Queue

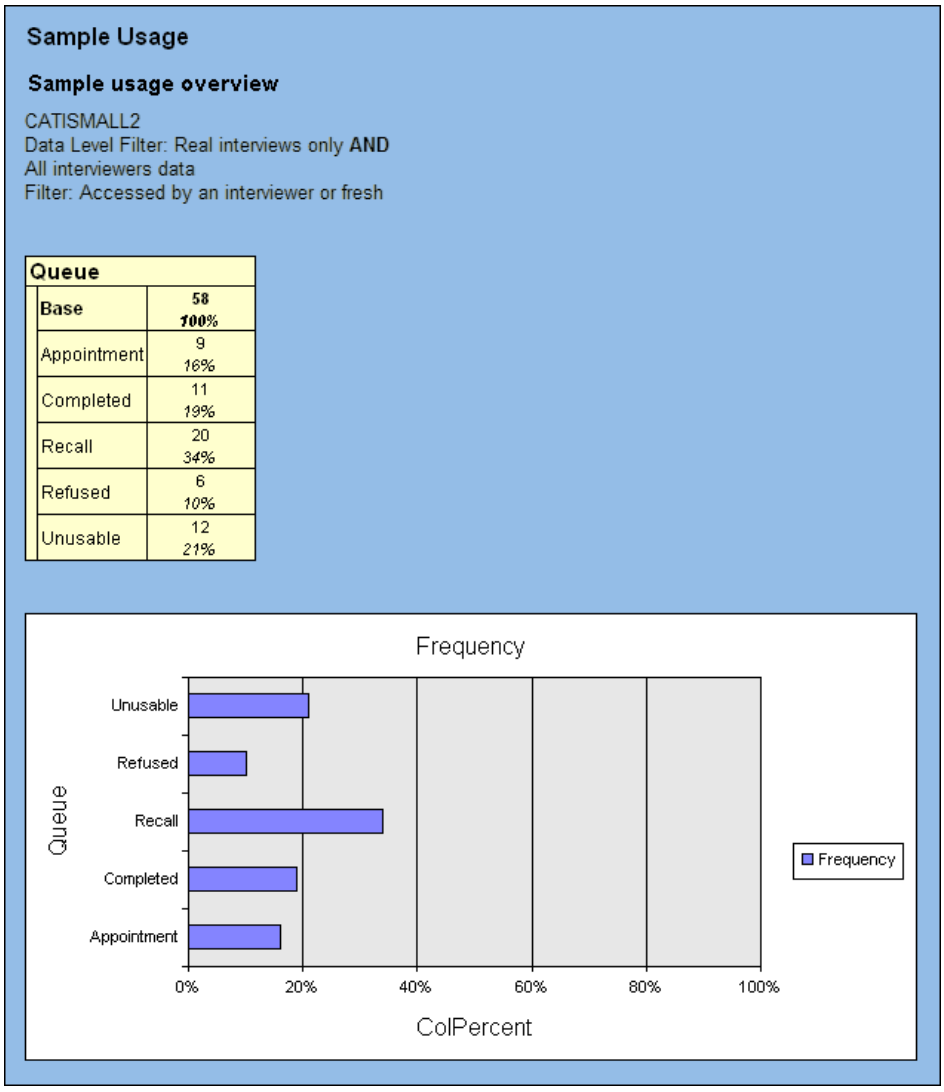
Call information crosstabulation for CATI Interviews
CATISMALL2
Data Level Filter: Real interviews only **AND**
All interviewers data **AND**
Sample based

Cell Contents:
- Count
- Column Percentage

	TryCount					
	Base	0	1	2	3	4
Queue						
Base	**1050001** ***100%***	**938581** ***100%***	**76713** ***100%***	**12292** ***100%***	**22413** ***100%***	**2** ***100%***
ACTIVE	**1257** *	869 *	287 *	101 *1%*	- -	- -
APPOINTMENT	- -	- -	- -	- -	- -	- -
CHECK_NUMBER	- -	- -	- -	- -	- -	- -
COMPLETED	**19920** ***2%***	3 *	17498 *23%*	1647 *13%*	772 *3%*	- -
FAILED	**5** *	- -	- -	5 *	- -	- -
FRESH	**915743** ***87%***	915743 *98%*	- -	- -	- -	- -
MAX_TRIES	**19977** ***2%***	- -	- -	- -	19977 *89%*	- -
NOT_IN_USE	- -	- -	- -	- -	- -	- -
OVERQUOTA	- -	- -	- -	- -	- -	- -
RECALL	**37028** ***4%***	21744 *2%*	8616 *11%*	6668 *54%*	- -	- -
REFUSED	- -	- -	- -	- -	- -	- -
SILENT	**741** *	- -	456 *1%*	205 *2%*	80 *	- -
STOPPED	**26416** ***3%***	- -	23303 *30%*	2178 *18%*	935 *4%*	- -
TIMED_OUT	**172** *	- -	117 *	53 *	1 *	1 *50%*
TRANSFER_TO_WEB	- -	- -	- -	- -	- -	- -
UNUSABLE	**28742** ***3%***	222 *	26436 *34%*	1435 *12%*	648 *3%*	1 *50%*

Sample Usage

This report shows a frequency table of the number of participant records in each queue. Each cell contains a count and a column percentage. For projects that use an autodialer, the report includes the autodialer-specific queues called CHECK_NUMBER and SILENT.



Sample Usage Across Projects

This report shows a frequency table of the number of participant records in each queue, across projects, for each project. The report always includes both real and test data. Each cell contains a count and a column percentage. For projects that use an autodialer, the report includes the autodialer-specific queues called CHECK_NUMBER and SILENT.

Number of records in each queue across projects
AUTHORHDATA
Filter: ((project = "AUTHORHDATA") or (project = "AUTODIALING") or (project = "BASIC") or (project = "LISATEST") or (project = "MULTIMODE1") or (project = "PLAYBACKTEST"))

	Project		
	Base	AUTHORHDATA	MULTIMODE1
Queue			
Base	**340** *100%*	**170** *100%*	**170** *100%*
Active	- -	- -	- -
Appointment	- -	- -	- -
Check number	- -	- -	- -
Completed	**4** *1%*	1 *1%*	3 *2%*
Error during interview	- -	- -	- -
Fresh	**334** *98%*	168 *99%*	166 *98%*
Max tries	- -	- -	- -
Not in use	- -	- -	- -
Over quota	- -	- -	- -
Recall	- -	- -	- -
Refused	- -	- -	- -
Silent	- -	- -	- -
Stopped	**1** *	1 *1%*	- -
Timed out	- -	- -	- -
Transfer to web	- -	- -	- -
Unusable	**1** *	- -	1 *1%*

Report generated by: Admin

Time Zone Status

This report displays a list of all time zones in use by the project and whether the time zones are active or inactive based on valid call times or day parts.

Time Zone Status

Time zone	Status
(GMT) Casablanca, Monrovia, Reykjavik	Dialing
(GMT) Greenwich Mean Time : Dublin, Edinburgh, Lisbon, London	Dialing
(GMT+01:00) Amsterdam, Berlin, Bern, Rome, Stockholm, Vienna	Dialing
(GMT+01:00) Belgrade, Bratislava, Budapest, Ljubljana, Prague	Dialing
(GMT+01:00) Brussels, Copenhagen, Madrid, Paris	Dialing
(GMT+01:00) Sarajevo, Skopje, Warsaw, Zagreb	Dialing
(GMT+01:00) West Central Africa	Dialing
(GMT+02:00) Athens, Bucharest, Istanbul	Dialing
(GMT+02:00) Cairo	Dialing
(GMT+02:00) Harare, Pretoria	Dialing
(GMT+02:00) Helsinki, Kyiv, Riga, Sofia, Tallinn, Vilnius	Dialing
(GMT+02:00) Jerusalem	Dialing
(GMT+02:00) Minsk	Dialing
(GMT+03:00) Baghdad	Dialing
(GMT+03:00) Kuwait, Riyadh	Dialing
(GMT+03:00) Moscow, St. Petersburg, Volgograd	Dialing
(GMT+03:00) Nairobi	Dialing
(GMT+03:30) Tehran	Dialing
(GMT+04:00) Abu Dhabi, Muscat	Dialing
(GMT+04:00) Yerevan	Dialing
(GMT+04:30) Kabul	Dialing
(GMT+05:00) Ekaterinburg	Dialing
(GMT+05:00) Islamabad, Karachi, Tashkent	Dialing
(GMT+05:30) Chennai, Kolkata, Mumbai, New Delhi	Dialing
(GMT+05:30) Sri Jayawardenepura	Dialing
(GMT+05:45) Kathmandu	Dialing
(GMT+06:00) Almaty, Novosibirsk	Dialing
(GMT+06:00) Astana, Dhaka	Dialing
(GMT+06:30) Yangon (Rangoon)	Dialing
(GMT+07:00) Bangkok, Hanoi, Jakarta	Dialing
(GMT+07:00) Krasnoyarsk	Dialing
(GMT+08:00) Beijing, Chongqing, Hong Kong, Urumqi	Dialing
(GMT+08:00) Irkutsk, Ulaan Bataar	Dialing
(GMT+08:00) Kuala Lumpur, Singapore	Dialing
(GMT+08:00) Perth	Dialing
(GMT+08:00) Taipei	Dialing
(GMT+09:00) Osaka, Sapporo, Tokyo	Dialing

Notes

You can customize many of the reports listed above, or even add your own reports to the Phone activity. For more information, use the search function in the Data Collection Developer Library documentation to search for the text "Customized Telephone Interviewing (CATI) Reports" and in the search results open the topic with that title.

Instead of using the Phone activity, you can produce all of the reports listed above by running a IBM® SPSS® Data Collection script. The script is called *RunAllPhoneReports.mrs*, which by default is installed by the DDL in the *[INSTALL_FOLDER]\IBM\SPSS\DataCollection\6\DDL\Scripts\General\mrScriptBasic* folder. By editing a parameter in the script, you can select any of the following report formats: HTML; Microsoft Excel; Microsoft Powerpoint; Microsoft Word; delimited text (*.csv*) file. You can also specify a date range for those reports that require one, and whether the reports should use real or test data.

Starting Phone

- Select the project you want to work on and click Phone.

This opens the Phone activity, which displays a list of available reports on its Overview tab.

Figure 1-63

Overview
Selected Report
User: Admin
Site: 25
Date Filter:
No limit
Sample Filter:
No limit
Refresh
Phone Reports
Project Id: BOBOCOUNT_CATI
Project Name: cati
Description:
Select the report to view in the list below. The selected report is displayed in the second tab.
Available Reports
Call History Based
Answer Time Distribution
Answer time distribution for dialer calls
Busy, Wait and Idle Time
Busy, wait and idle time per interviewer
Busy, Wait and Idle Time Across Projects
Busy,wait and idle time across projects in last 8 hours
Call Outcome Status
Call outcomes chosen by interviewers
Dialer Statistics
Dialer statistics in last 8 hours
Interviewer Statistics
Connect time and call outcomes per interviewer
Interviewer Statistics Across Projects
Interviewer statistics across projects in last 8 hours
Silent Call Statistics
Silent calls as a percentage of connected and all auto-dialed calls
Sample Based
Appointment Distribution
Appointment distribution for the next 2 days
Appointments Summary
List appointments made by interviewers within a specified time period
Call Outcome by Segment
Call outcomes by Queue and Segment
Calls by Segment
Number of calls by Queue and Segment
Incidence Statistics
Interviewer statistics and sample distribution
Overall Disposition Across Projects
Last call outcome statistics across projects
Queue Status
Queue status by group with calculations
Queue Status By Time Zone
Queue status crossed with time zone
Review Calls
Cross-tabulate call information
Sample Usage
Number of records in each queue
Sample Usage Across Projects
Number of records in each queue across projects
Time Zone Status
Active/Inactive times zones based on valid call times or day parts

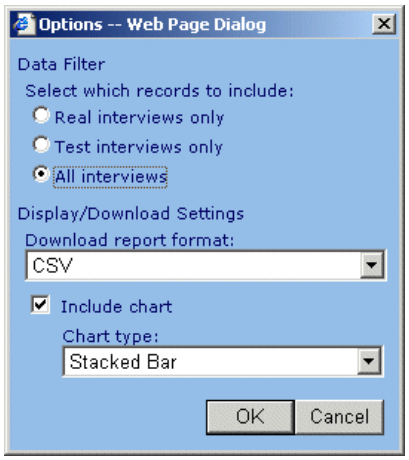
Running Reports

When you run a report, you can choose whether the report will include the following:

- Real or test interview data, or both interview types.
- A chart.
- All records, or only records that relate to a specific time period.
- Project sample information or data.

Running a report

► From the Tools menu, choose Options. This opens the Options dialog box as shown below.



- By default, many reports include data only for real interviews. If you want your report to include data only for test interviews, or for both real and test interviews, change the value of Data Filter as required.

  If your project was created using version 3.0 or earlier of IBM® SPSS® Data Collection Interviewer Server, or you intend to run one of the three reports that are related to the use of an autodialer, skip the previous step—your report will always include data for both real and test interviews.

  Note: In the project's sample table, participant records are defined as either real or test by the value of the *Test* column. If the value is Null, the Phone activity will treat the record as being both real and test. For more information, see Mapping Fields to Required Columns in the Sample Table.

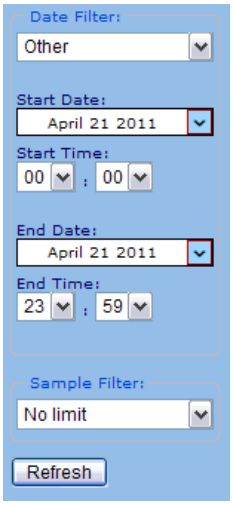
- To include a chart with your report, select Include chart and choose the chart type from the drop-down list.

  Note 1: To be able to select the "Include chart" option, you must have first enabled charts in the Phone activity. For more information, search the *Interviewer Server Installation Instructions and Configuration Notes* for the topic "Enabling Charts in the Phone Reports Activity".

  Note 2: Not all reports can include a chart—see the individual description of each report in Phone for details.

- To save your settings and close the Options dialog box, click OK.

- In the frame on the left of the Overview tab, you can select an existing Date Filter or Sample filter from the provided drop-down lists as shown below.



To enter your own date and time range, select Other from the Date Filter list and then specify the start and end dates and times using the drop-down lists. Note that the start and end times refer to times in the Interviewer Server server's local time zone, which might not be the same as your local time zone. To specify that no filtering is required, select No limit.

For more information about creating your own filters, see Filtering Reports.

Note: The Appointments Summary report ignores any filter that you have selected. If you run that report, the Phone activity will prompt you to enter a time period.

- In the Available Reports window, select the report that you want to run. This opens the Selected Reports tab.
- Some reports prompt for additional information, as follows:
  - For the Review Calls report, select the variables that are to form the side and top of the table from the drop-down lists.
  - For the Appointments Summary report, select the start and end dates from the calendars.
- If you have been prompted to enter additional information, click Generate Report to run the report.

  After a brief pause, the Phone activity displays the report in the Selected Reports tab.

  You can change the filter criteria for the displayed report (except for the Appointments Summary report) by selecting a different option from the Date Filter or Sample Filter drop-down lists and clicking the Refresh button.

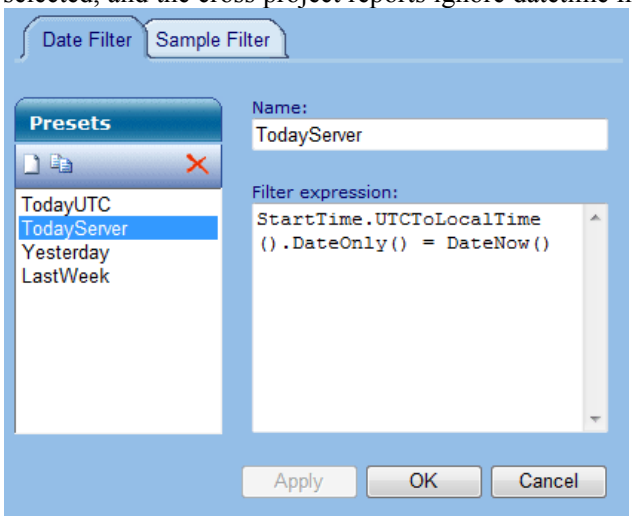
  Note: When the current report does not include time filters, the Refresh button is enabled and the time filters are disabled. To specify that a specific report should not include time filters, the report name must be added to the Phone activity's *web.config* file. Refer to the topic *Settings for the Phone Activity* in the IBM® SPSS® Data Collection Developer Library for more information.

Filtering Reports

When you run or download a report, you can choose to include only records that relate to a specific time period or choose records that contain specific sample information or data. You do this by selecting a filter to apply to the report.

When installed, the Phone activity includes several different filters, which you can amend to suit your own requirements. You can also add your own filters, or delete filters that you no longer want. You define a filter by writing a filter expression.

Note that you cannot amend or delete the "Other" and "No limit" filters installed with the Phone activity. In addition, the Appointments Summary report ignores any filter that you have selected, and the cross project reports ignore datetime filters.



Adding a date filter

- From the Tools menu, choose Set Filters. This opens the Set Filters dialog box.
- Select the Date Filter tab.
- In Name, enter the name of your new filter. The maximum filter name length is 128 characters.
- In Filter expression, enter the expression for your new filter. The maximum filter expression length is 512 characters. For more information, see "Writing a Filter Expression" at the end of this topic.
- Click Add. This adds your new filter to the list of filters.
- To save your new filter and close the Set Filters dialog box, click OK. Alternatively, click Cancel if you do not want to save your new filter.

  Note: An alternative for adding either a date or sample filter is using the Copy button. This will copy the selected filter, allowing you to rename the filter and edit the syntax.

Editing a date filter

- From the Tools menu, choose Set Filters. This opens the Set Filters dialog box.
- Select the Date Filter tab.

- In Filters, select the filter you want to edit and click Edit.
- In Filter expression, amend the expression and click Update. For more information, see "Writing a Filter Expression" at the end of this topic.
- To save your revised filter and close the Set Filters dialog box, click OK. Alternatively, click Cancel if you do not want to save your amendment.

Deleting a filter

- From the Tools menu, choose Set Filters. This opens the Set Filters dialog box.
- Select the Date Filter tab.
- In Filters, select the filter you want to delete and click Delete. This opens a confirmation dialog box.
- Click OK. This removes the filter from the list of filters.
- To delete the filter and close the Set Filters dialog box, click OK. Alternatively, click Cancel if you do not want to delete the filter.

Adding a sample filter

- From the Tools menu, choose Set Filters. This opens the Set Filters dialog box.
- Select the Sample Filter tab.
- In Name, enter the name of your new filter. The maximum filter name length is 128 characters.
- In Filter expression, enter the expression for your new filter. The maximum filter expression length is 512 characters. For more information, see "Writing a Filter Expression" at the end of this topic.
- Click Add. This adds your new filter to the list of filters.
- To save your new filter and close the Set Filters dialog box, click OK. Alternatively, click Cancel if you do not want to save your new filter.

  Note: An alternative for adding either a date or sample filter is using the Copy button. This will copy the selected filter, allowing you to rename the filter and edit the syntax.

Editing a sample filter

- From the Tools menu, choose Set Filters. This opens the Set Filters dialog box.
- Select the Sample Filter tab.
- In Filters, select the filter you want to edit and click Edit.
- In Filter expression, amend the expression and click Update. For more information, see "Writing a Filter Expression" at the end of this topic.
- To save your revised filter and close the Set Filters dialog box, click OK. Alternatively, click Cancel if you do not want to save your amendment.

Deleting a sample filter

- From the Tools menu, choose Set Filters. This opens the Set Filters dialog box.
- Select the Sample Filter tab.
- In Filters, select the filter you want to delete and click Delete. This opens a confirmation dialog box.
- Click OK. This removes the filter from the list of filters.
- To delete the filter and close the Set Filters dialog box, click OK. Alternatively, click Cancel if you do not want to delete the filter.

Writing a Filter Expression

The expression text that you use in filter expressions must be supported by the IBM® SPSS® Data Collection Data Model and can include functions from the IBM® SPSS® Data Collection Function Library. For more information, use the search function in the IBM® SPSS® Data Collection Developer Library documentation to search for the text "Expression Evaluation" and in the search results open the topic with that title.

Downloading Reports

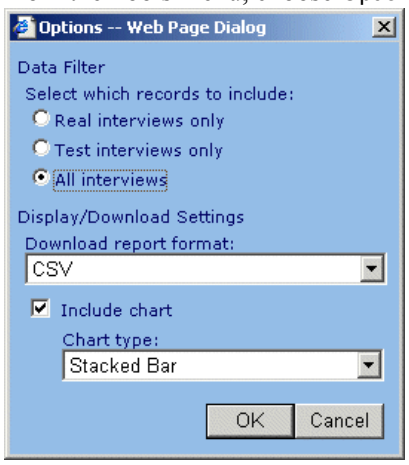
You can download one or more reports to HTML or CSV files. The Phone activity will add the report files to a *.zip* file, which you can save to the location of your choice.

When you download reports, you can choose whether the reports will include the following:

- Real or test interview data, or both interview types.
- A chart.
- All records, or only records that relate to a specific time period.
- Project sample information or data.

To Download Reports

- From the Tools menu, choose Options. This opens the Options dialog box as shown below.



- By default, many reports include data only for real interviews. If you want your reports to include data only for test interviews, or for both real and test interviews, change the value of Data Filter as required.

  If your project was created using version 3.0 or earlier of IBM® SPSS® Data Collection Interviewer Server, or you intend to download only the three reports that are related to the use of an autodialer, skip the previous step—your reports will always include data for both real and test interviews.

  Note: In the project's sample table, participant records are defined as either real or test by the value of the *Test* column. If the value is Null, the Phone activity will treat the record as being both real and test. For more information, see Mapping Fields to Required Columns in the Sample Table.

- From the "Download report format" drop-down list, select the format for the downloaded file, either HTML or CSV.

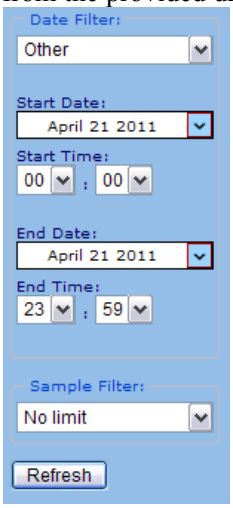
- To include a chart with each report, select Include chart and choose the chart type from the drop-down list.

  Note 1: To be able to select the "Include chart" option, you must have first enabled charts in the Phone activity. For more information, search the *Interviewer Server Installation Instructions and Configuration Notes* for the topic "Enabling Charts in the Phone Reports Activity".

  Note 2: Not all reports can include a chart—see the individual description of each report in Phone for details.

- To save your settings and close the Options dialog box, click OK.

- In the frame on the left of the Overview tab, you can select an existing Date Filter or Sample filter from the provided drop-down lists as shown below.



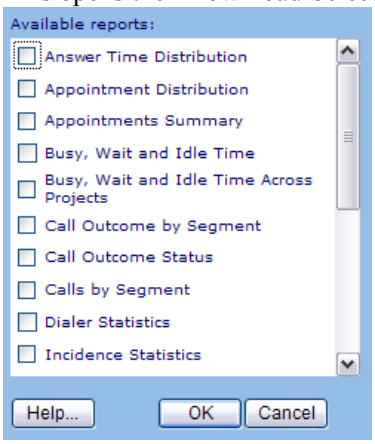
  To enter your own date and time range, select Other from the Date Filter list and then specify the start and end dates and times using the drop-down lists. Note that the start and end times refer to times in the Interviewer Server server's local time zone, which might not be the same as your local time zone. To specify that no filtering is required, select No limit.

  For more information about creating your own filters, see Filtering Reports.

Note: The filter that you have selected will apply to all the reports that you choose to download, except for the Appointments Summary report. If you download that report, the Phone activity will prompt you to enter a time period.

- From the Phone activity menu, choose:
  Tools > Download > Selected Reports

  This opens the "Download Selected Reports" dialog box as shown below.



- Select the reports that you want to download and click OK.
- Some reports prompt for additional information, as follows:
  - For the Review Calls report, select the variables that are to form the side and top of the table from the drop-down lists.
  - For the Appointments Summary report, select the start and end dates from the calendars.
- If you have been prompted to enter additional information, click OK to download the reports.
- When prompted, choose whether to open the *.zip* file in its associated program or save it to the location of your choice.

About Segments

Segments are a means of categorizing records using groupings of your choice. If segment information is present in the project's sample table, the Phone activity further breaks the data down by segment when running either the "Call Outcome by Segment" report or the "Calls by Segment" report.

Segment is not a required column in the sample table, and if not present the report shows information at the top level only. Alternative names for the Segment column, in priority order, are Market, Location, Region, or Bucket. That is, if there is no Segment column, the Phone activity looks for a column called Market and uses that; if there isn't a Market column it looks for one called Location, and so on. Whatever its name, make sure that you set the column's Can Tabulate option to True on the Fields tab of the Phone Surveys activity.

Export Data

You use Export Data to export interview data for analysis using products such as IBM® SPSS® Data Collection Survey Tabulation or IBM® SPSS® Statistics. The files that Export Data creates are written to a zip file in your user folder. The filename is InterviewExporter.*ProjectName*.*DataType*.*DateTime*.zip; for example, InterviewExporter.test.csv.20061120.1600.zip for a delimited text file for the test project, exported at 4pm on 20 November 2006.

You can export data in the following formats:

- Delimited Text File (Excel)
- IBM SPSS Data Collection Data File (supports hierarchical data)
- Quantum Data File (DAT)
- SAS System File
- SPSS Statistics File (SAV)
- Triple-S Data File (Fixed or CSV)
- Data Collection XML Data File (supports hierarchical data)

You can calculate and then generate two extra data columns that contain the start and finish times for each case. The start and finish times are based on the selected time zone of your choosing.

You can also include only records that relate to a specific filter condition (such as time period or survey status). Export Data provides several filters that you can modify to suit your requirements. You can also create your own filters, or delete filters that are no longer needed.

If you are exporting in delimited text format and the data contains categorical data, you may choose between exporting category (response) names or values (codes).

You can export the following types of data:

- Respondent data only (that is, data from live interviews)
- Test data only
- Both respondent and test data

and can include all system variables, only common system variables, or no system variables at all. You can also choose which types of data variables to export; for example, categorical and numeric variables but not text, boolean, or date variables.

You can export data with any combination of the following interview statuses:

- Completed successfully
- Active/in progress
- Timed out
- Stopped by the script
- Stopped by the respondent
- Interview system shutdown
- Terminated by a signal from the questionnaire script
- Reviewed

Finally, you can choose to export data gathered before or after a specific date/time, or select a date/time range.

An advanced option is available for users who want more control over the export process.

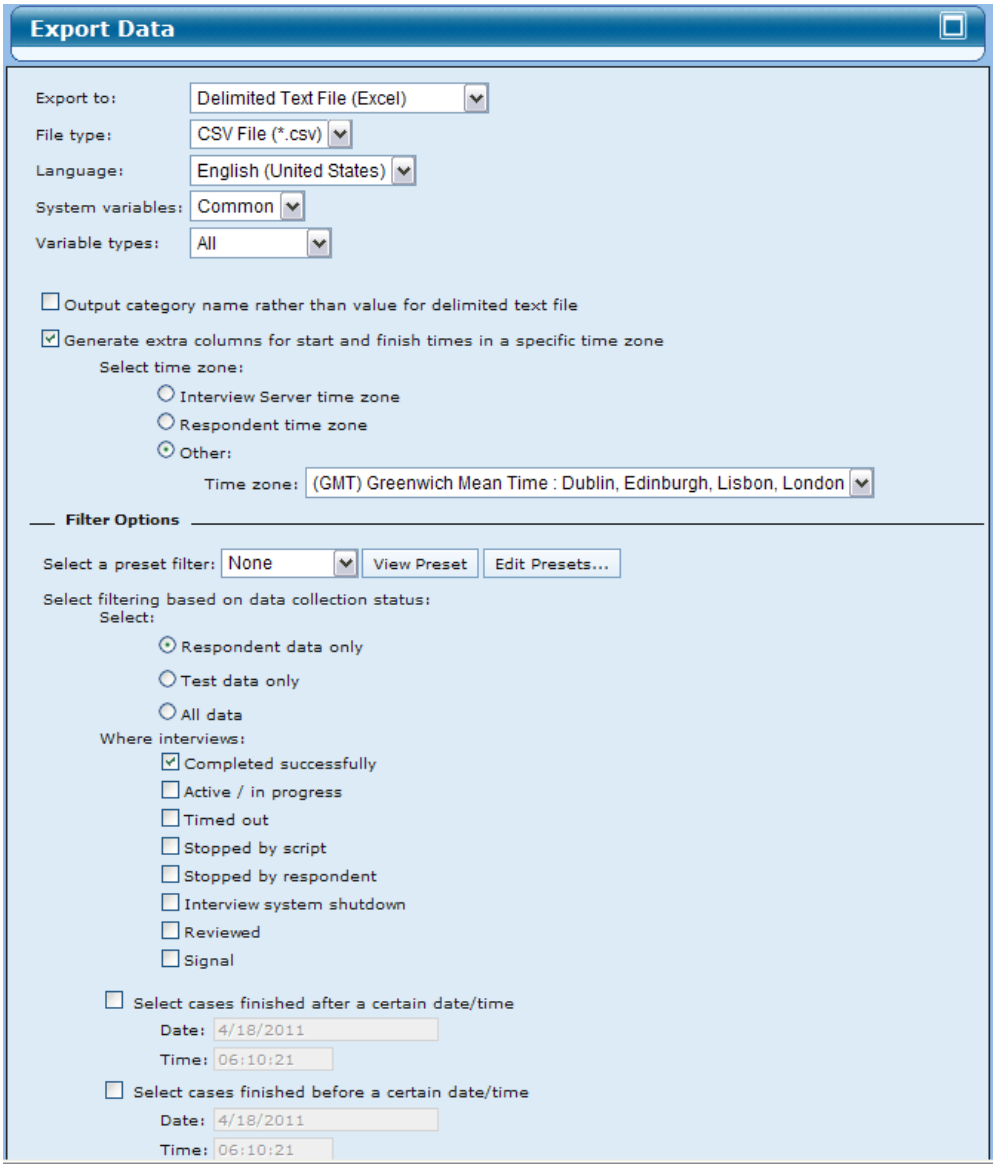
Export Data does not normally export dirty data but can be configured to do so. Speak to your IBM® SPSS® Data Collection Interviewer Server administrator if you need to export dirty data.

Starting Export Data

- Select the project whose data you want to export and click Export Data.

Exporting Data

The main Export Data page is where you define the data format that you want to use for the output data file, and the type of data you want to export to that file.



Export Data uses the project's DataLocation property in DPM to find the questionnaire definition (*.mdd*) file and the case data. If DataLocation points to a project folder in the User area and there is no *.mdd* file there, Export Data will instead look for a *.mdd* file in the Shared project folder.

If the *.mdd* file contains more than one version, Export Data uses the superversion — that is, a combination of all versions, which results in data for all questions that appear in any version being exported.

If you are exporting data in IBM® SPSS® Quantum™ format and IBM® SPSS® Data Collection Metadata Model to Quantum has previously been run on the case data, Export Data will use the column allocations made using Metadata Model to Quantum rather than making new allocations.

Note: If you downloaded the *.mdd* in order to run Metadata Model to Quantum, remember to upload it into the shared area before running Export Data.

Exporting data

- In Export to, choose the data format in which you want to write the exported data. Hierarchical data is supported in the IBM SPSS Data Collection Data File and Data Collection XML Data File formats.

  Note: When the MDM document contains unbounded loop questions, and you select IBM SPSS Data Collection Data File or Data Collection XML Data File, the export will use HDATA (otherwise VDATA is used).

- If the data format allows more than one file type, use the File type box to select the one you want to use.

- If the questionnaire definition (*.mdd*) file contains more than one language, use the Language box to select the language you want to use for question, response, and other texts. The default is the project's default (base) language.

- In System variables, choose how you want to deal with system variables. You can export all system variables, no system variables, or only the common system variables.

- If you do not want to export all data variable types, do the following:
  - In Variable types choose Select below. Export Data displays one checkbox for each variable type below the Variable types box.
  - Uncheck the boxes for the variables you do not want to export.

- If you are exporting data in Quantum format, a set of prompts to do with card column options is displayed. Do the following:
  - In Width of serial number, type the number of columns to reserve for the respondent serial number. The default is five columns.
  - In Width of card number, type the number of columns to reserve for the card number. The default is two columns.
  - In Max card length, type the maximum number of columns to write per card. The default is 80.
  - In Full name of serial variable, type the serial variable name. The serial variable stores the respondents' serial numbers.

- If you are exporting data in delimited text format and you want to export category names rather than values (codes), click Output category name rather than value for delimited text file.

- Select Generate extra columns for start and finish times in a specific time zone to calculate and then generate two extra data columns that contain the start and finish times for each case. You can select the following time zones:
  - Interview Server time zone - when selected, the Interview Server's time zone is used as the start and finish time zone values.
  - Respondent time zone - when selected, the respondent's time zone is used as the start and finish time zone values.

    Note: When daylight savings time is in effect in the respondent's time zone, an offset of 60 minutes is applied.
  - Other - when selected, you can select any start/finish time zone from the provided Time zone list. The default time zone is *(GMT) Greenwich Mean Time*.

Filtering exported data

The Filter Options section allows you to include only records that relate to a specific filter condition (such as time period or survey status). Export Data provides several preset filters that you can modify to suit your requirements as well as shortcuts to support filtering based on status and date time. You can also create your own filters, or delete preset filters that are no longer needed.

- Select an appropriate filter preset from the Select a preset filter list. You can create new, modify existing, or delete existing filters. Refer to Edit Preset Filters dialog for information on creating, modifying, and deleting filters.
  - View preset: Click to display the filter expression for the selected preset filter.
  - Hide preset: Click to hide the filter expression for the selected preset filter.
  - Edit presets: Click to create a new, modify an existing, or delete an existing filter. For more information, see the topic Edit Preset Filters dialog on p. 265.
  - Filter expression: Displays the expression for the selected preset filter. Click Edit Presets to modify the expression. For more information, see the topic Edit Preset Filters dialog on p. 265.
- Under Select filtering based on data collection status, choose Respondent data only, Test data only, or All data, and then at least one of the interview result types.
- Optionally, enable the Select cases finished after a certain date/time and/or the Select cases finished before a certain date/time options.
  - When Select cases finished after a certain date/time is selected, and an appropriate date/time is defined, cases that finish after the specified date/time are returned.
  - When Select cases finished before a certain date/time is selected, and an appropriate date/time is defined, cases that finish before the specified date/time are returned.
  - When both Select cases finished after a certain date/time and Select cases finished before a certain date/time are selected, cases that fall between the two specified dates/times are returned.

  Note: The defined filter condition date/time options do not correspond to the selected Respondent time zone. When defining the Select cases finished after a certain date/time and Select cases finished before a certain date/time options, the times are based on Coordinated Universal Time (UTC).
- Click Download Now after applying the appropriate settings.

  This opens the Exporting dialog box. Messages are displayed in this dialog box documenting the export's progress and, when the export is complete, the number of cases transferred. Note that Export Data does not normally export dirty data but can be configured to do so. Speak to your IBM® SPSS® Data Collection Interviewer Server administrator if you need to export dirty data.
- When prompted, choose whether to open the file from its current location or save it in a location of your choice.

Edit Preset Filters dialog

The Edit Preset Filters dialog provides options for creating, modifying, and deleting filters.

Creating a filter

- From Export Data, click Edit Presets next to the Select a preset filter field. This displays the Edit Preset Filters dialog, allowing you to define a new filter.
- Click the Add a new preset icon to add to new filter to the list of preset filters.
- Enter an appropriate filter name in the Name field.
- Enter the appropriate expression in the Filter expression field. Refer to the **Writing filter expressions** section below for more information.
- Click Apply to save the new filter; click Cancel to discard the new filter.

Modifying an existing filter

- From Export Data, click Edit Presets next to the Select a preset filter field. This displays the Edit Preset Filters dialog, allowing you to modify an existing filter.
- In the Presets list, select a filter to modify. The selected filter name and expression display in their respective Name and Filter expression fields.
- Edit the filter expression as appropriate, and click Apply. Refer to the **Writing filter expressions** section below for more information.
- Click OK to save the modified filter; click Cancel to discard the changes.

Copying an existing filter

- From Export Data, click Edit Presets next to the Select a preset filter field. This displays the Edit Preset Filters dialog, allowing you to modify an existing filter.
- In the Presets list, select a filter to copy.
- Click the Copy & Paste icon. The selected filter is duplicated with a number appended to its name.
- Edit the copied filter name and expression as appropriate, and click Apply. Refer to the **Writing filter expressions** section below for more information.
- Click OK to save the cloned filter; click Cancel to discard the changes.

Deleting a filter

- Click Edit Presets next to the Select a preset filter field. This displays the Set Filters dialog, allowing you to delete an existing filter.
- In the Presets list, select a filter to delete, and then click the Delete icon.

Writing filter expressions

The expression text used in filter expressions must be supported by the IBM® SPSS® Data Collection Data Model and can include functions from the IBM® SPSS® Data Collection Function Library. Refer to the *Expression Evaluation* topic in the IBM® SPSS® Data Collection Developer Library for more information.

Exporting Only Common System Variables

System variables contain general information about the interview as a whole rather than data related to an individual question and, as such, they may be of little use for analysis purposes. However, rather than forcing you to choose between exporting all or no system variables, Export Data offers a third option of exporting only the more commonly used system variables. These are as follows:

Variable Name	Description
Respondent.ID	ID that links a respondent record to log entries. This is either the ID from the sample record or an ID generated randomly by IBM® SPSS® Data Collection Interviewer Server.
Respondent.Serial	Respondent serial number
DataCollection.Status	Interview status (completed, stopped, timed out, and so on).
DataCollection.StartTime	Interview start time.
DataCollection.FinishTime	Interview end time.
DataCollection.MetadataVersionNumber	Version number of the metadata used for this interview.
DataCollection.TerminateSignal	Signal used to terminate the interview.

Recommended Procedure for Exporting IBM SPSS Data Collection Interviewer Server Data to IBM SPSS Quantum

The following procedure is recommended for exporting data in IBM® SPSS® Quantum™ format.

- In IBM® SPSS® Data Collection Interviewer Server Administration, run the Launch activity to activate the project.

  This ensures that the *.mdd* file contains up to date information about the questions in the questionnaire.

- Run IBM® SPSS® Data Collection Metadata Model to Quantum on the *.mdd* file you have just updated.

- Reactivate the questionnaire.

  The version of the *.mdd* file in the Shared project folder will now contain card and column information.

- In Interviewer Server Administration, run Export Data to export the data.

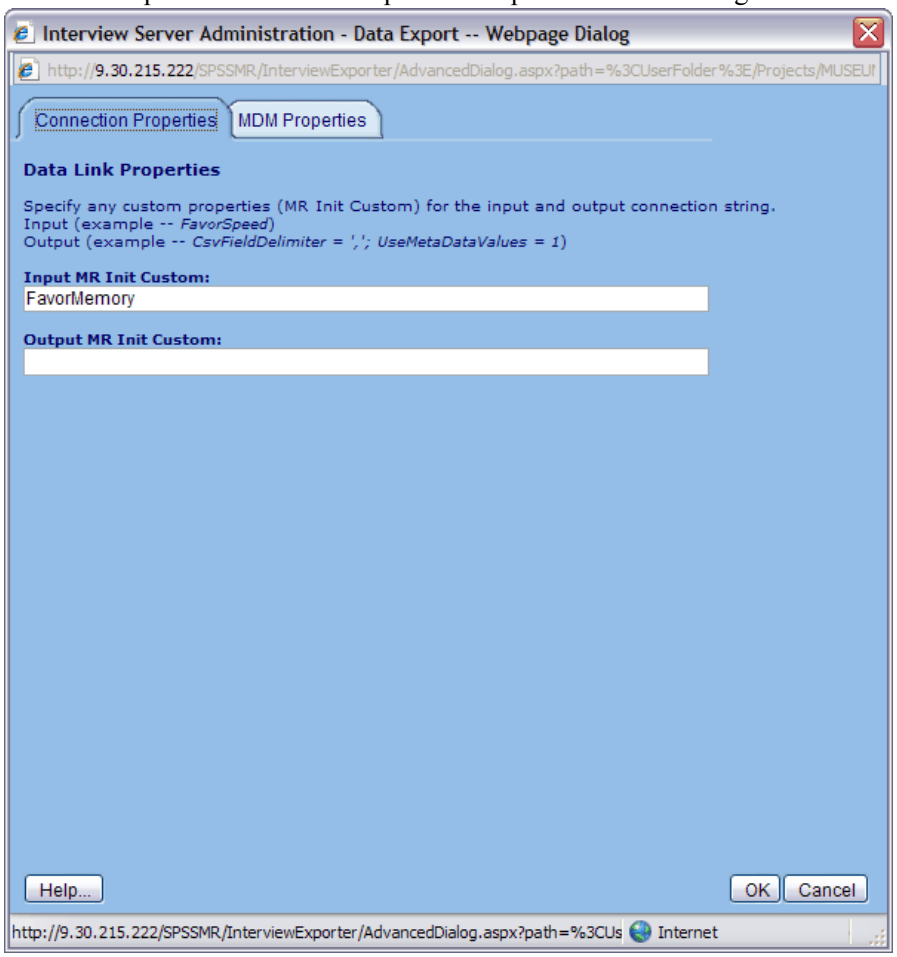
Advanced Options

The Interviewer Server Administration - Export Data dialog displays when you click Advanced from Export Data. The dialog provides the following options.

Connection Properties tab

Note: The Connection Properties tab is only visible if you are assigned the *canAlterConnectionProperties* feature for the Export Data activity . Refer to *Assigning users or roles to activity features* topic in the IBM® SPSS® Data Collection Interviewer Server Administration User's Guide for more information on activity features.

The Connection Properties tab provides inputs for custom properties, allowing you to define the mr Init Custom portion of both the input and output connection strings.



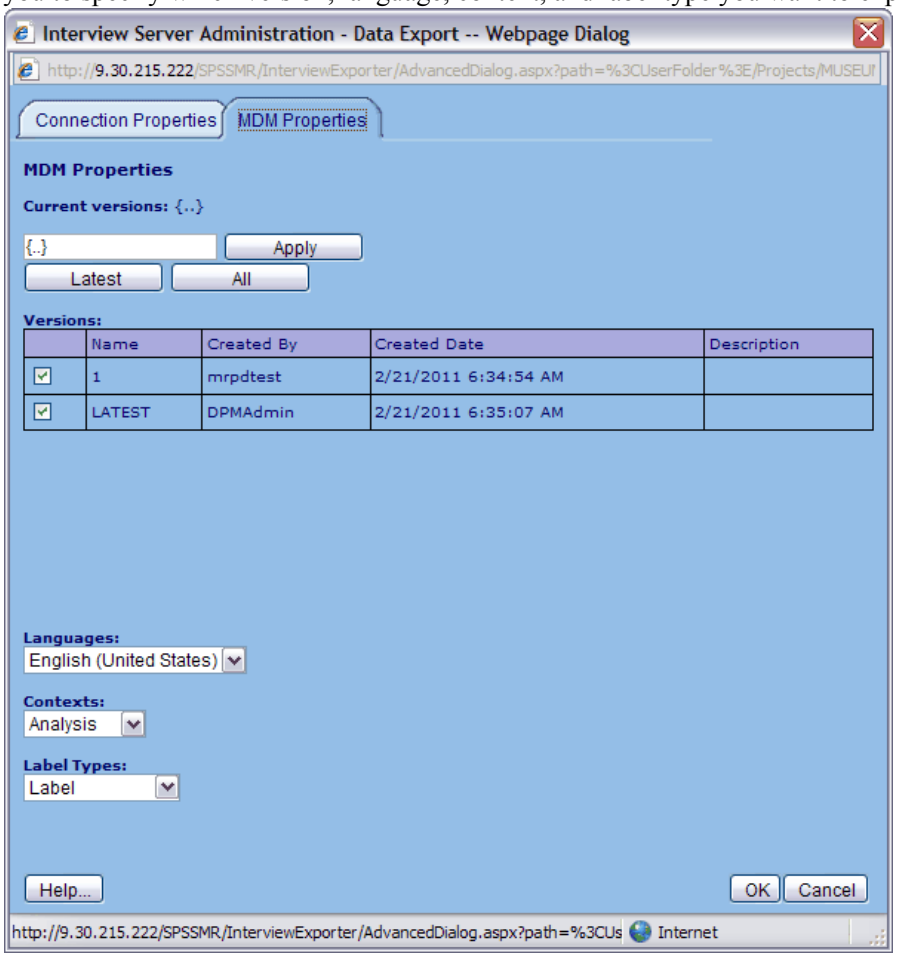
Input MR Init Custom: Allows you to define the **MR Init Custom** portion of input connection string.

Output MR Init Custom: Allows you to define the **MR Init Custom** portion of output connection string.

Refer to the *Connection Properties* topic in the IBM® SPSS® Data Collection Developer Library for more information regarding **MR Init Custom** connection properties.

MDM Properties tab

The MDM Properties tab provides more control over the type of data that is exported by allowing you to specify which version, language, context, and label type you want to export.



Questionnaire definition (*.mdd*) files typically contain **versions**, which record any changes to the content of the questionnaire. Typically, when the questionnaire changes (for example, a question or category is added or deleted), a new version is created and when the changes are complete, the version is locked.

Using a combination of some or all of the versions is useful when, for example, you want to export case data for more than one version and there have been changes to the variable and category definitions that mean that case data collected with one version is not valid in another version. Selecting all of the versions for which you want to export the case data, means that generally you can export the case data collected with the different versions at the same time without encountering validity errors due to the differences between the versions. However, depending on the version changes, some validity errors may still be encountered.

Current version. Displays an expression that represents the selection you have chosen. You can optionally select the versions you want to use by typing an expression directly into the text box.

Syntax	Description
..	Specifies all versions
v1, v2, v3, v4	Specifies individual versions
v1..v2	Specifies an inclusive range of versions
^v1..v2	Excludes a range of versions
	Specifies the most recent version.

You can specify a combination of individual versions, and ranges to include or exclude. For example, the following specifies version 3:2 and all versions from 4:5 to 7:3 with the exception of versions 7 through 7:2:

```
3:2, 4:5..7:3, ^7..7:2
```

When there is a conflict between the versions, the order of precedence is taken from the order in which versions are specified in the expression, with the rightmost versions taking precedence over the leftmost. For example, if a category label differs in the versions you select, the text in the version with the higher precedence will be used. However the order of questions and categories is always taken from the most recent version and there is special handling of changes to loop definition ranges and the minimum and maximum values of variables.

For more information, see the topic Version Expressions on p. 271.

Latest. Select this option if you want to use the most recent version.

All. Select this option if you want to use a combination (superset) of all of the available versions. (This is sometimes called a **superversion**).

Versions. A list of all of the versions that are available. For each version, the following information is shown:

- **Name.** The version name. Version names are made up of a combination of the major version and minor version numbers in the form *Major#:Minor#*, where *Major#* is the number of the major version and *Minor#* is the number of the minor version. Changes in the major version number indicate that the structure of the case data has changed (for example, variables or categories have been added or deleted) whereas changes in the minor version number indicate that the changes affect the metadata only (for example, a question text has been changed). Version names are created automatically when a version is locked. A version that has not been locked is always called *LATEST*.
- **Created by.** The ID of the user who created the version.
- **Created Date.** This shows the date and time at which the version was locked.
- **Description.** When present, this is a text that gives information about the version.

Languages. Select the language you want to use. You can change the language only if there is more than one language defined.

Contexts. Select the user context you want to use. The user context controls which texts are displayed. For example, select Question to display question texts, or Analysis to display shorter texts suitable for displaying when analyzing the data.

LabelTypes. Select the label type you want to use. You should generally select the Label option.

Version Expressions

When you open a metadata (*.mdd*) file, you can specify the version or versions you want to use. This topic describes the syntax that you use to specify the version or versions.

You can specify a single version using its name. Version names are made up of a combination of the major version and minor version numbers in the form *Major#:Minor#*, where *Major#* is the number of the major version and *Minor#* is the number of the minor version. Changes in the major version number indicate that the structure of the case data has changed (for example, variables or categories have been added or deleted) whereas changes in the minor version number indicate that the changes affect the metadata only (for example, a question text has been changed). Version names are created automatically when a version is locked. A version that has not been locked is always called *LATEST*.

You can open the latest minor version that belongs to a specified major version by entering the major version number followed by a colon. For example, if there are minor versions 2:1, 2:2, and 2:3, specifying 2: will open minor version 2:3.

You can use an expression to open a superset (sometimes called a **superversion**) of two or more versions. The order in which you specify the versions determines the order of precedence that is used when there is a conflict between versions. (The rightmost versions in the expression take precedence over the leftmost.) For example, if a category label differs in the versions you select, the text in the version with the highest precedence will be used. However the order of questions and categories is always taken from the most recent version and there is special handling of changes to loop definition ranges and the minimum and maximum values of variables between the versions.

The version expression syntax is:

{<version> [**,** <version>]***}**

<version>::= *VersionName* | [**^**] [*VersionName*] **..** [*VersionName*]

where *VersionName* is the name of a major or minor version and ^ indicates that the following range is to be excluded.

You can specify the name of versions that do not exist in a range. MDM will then automatically use the next highest or lowest name it encounters, depending on whether the name is specified at the start or end of the range and whether the range is in ascending or descending sequence.

Examples

Expression	Description
{..}	Include all versions in the MDM Document. If there are no versions, this selects the unversioned Document.
{2, 3, 7}	Include versions 2, 3, and 7 and give highest precedence to version 7, the next highest precedence to version 3, and the lowest precedence to version 2.
{5..1}	Include versions 5 through 1, giving the highest precedence to version 1.
{2..7,9}	Include versions 2 through 7 and version 9.
{2..11,^3:1..5:4}	Include versions 2 through 11 but exclude versions 3:1 to 5:4 inclusive.
{}	Include the most recent version in the MDM Document.
{LATEST}	Select the most recent version in the versions collection, whether or not it is named LATEST. If there are no versions, this selects the unversioned document.
{LASTLOCKED}	Include the most recent locked version in the MDM Document.

EBNF Definition

The syntax for specifying the version or versions to open can be specified using the following Extended Backus-Naur Form (EBNF), which is a notation for specifying the syntax of a language succinctly and precisely:

<versionname> ::= <version> | (<vername>**:**) | <range>
<range> ::= { <range_item>(**,** <range_item>)* }
<range_item>::= [**^**](<version>[**..**])|([<version>]**..**[<version>]))
<version> ::= (<vername>[:<vername>]) | **LATEST** | **LASTLOCKED**
<vername> ::= Any positive integer value

Interviewer Monitoring

The Interviewer Monitoring activity provides you with two key features to help you manage the performance of your teams:

- For the IBM® SPSS® Data Collection Interviewer Server projects that you have access to, a list of all interviewers together with statistics relating to their performance. This view can be set to refresh automatically.
- The ability to monitor an interviewer. In this view, your screen automatically synchronizes with the interviewer's screen so that you can see the question being asked by the interviewer. If the interviewer is using an autodialer to make calls, you can also listen to the interview.

In addition, if one or more of your Interviewer Server projects uses an autodialer, you can use the Interviewer Monitoring activity to monitor the percentage of silent calls that are occurring.

Note: An interviewer is defined as a IBM® SPSS® Data Collection Interviewer Server Administration user that has opened the Phone Participants activity.

Starting Interviewer Monitoring

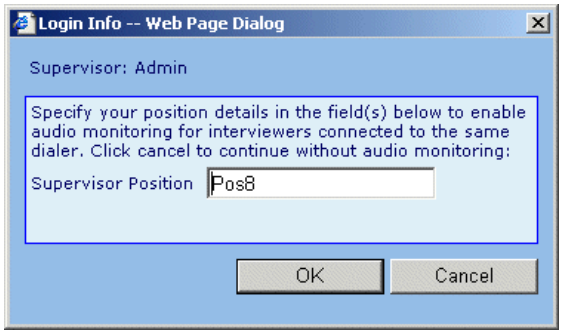
▶ From the IBM® SPSS® Data Collection Interviewer Server Administration menu, choose:
Phone > Interviewer Monitoring

The Interviewer Monitoring activity opens and the Interviewers tab is displayed.

When Autodialers are Used

If the call center that you are working in uses autodialers to call participants, a dialog box might open and request that you enter a position name, as shown below:

Figure 1-64
Position dialog box


Login Info -- Web Page Dialog
Supervisor: Admin
Specify your position details in the field(s) below to enable audio monitoring for interviewers connected to the same dialer. Click cancel to continue without audio monitoring:
Supervisor Position
Pos8
OK
Cancel

In the Supervisor Position field, enter the position name and click OK. If you click Cancel instead, the Interview Monitoring activity will still open, but only visual monitoring will be possible—audio monitoring will not be available.

For more information, see Dialer Administration.

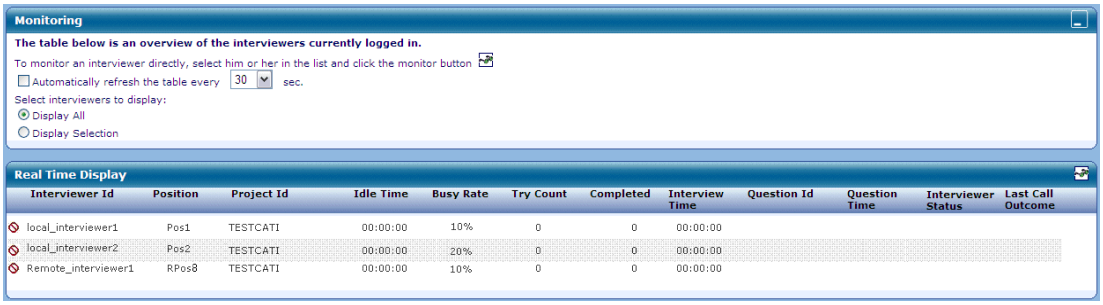
Setting up Monitoring

By default, the Interviewer Monitoring activity can be opened by anyone who is a member of the CATIsupervisor role. For the IBM® SPSS® Data Collection projects that you have access to, all interviewers are automatically included in the Interviewers Real Time display and no additional setup tasks are required.

Audio monitoring is available only if the interviewer is using an autodialer to make calls, and the supervisor's station is connected to the same autodialer.

The Interviewers Real Time Display

Figure 1-65
Interviewers tab


Monitoring
The table below is an overview of the interviewers currently logged in.
To monitor an interviewer directly, select him or her in the list and click the monitor button
Automatically refresh the table every 30 sec.
Select interviewers to display:
Display All
Display Selection
Real Time Display
Interviewer Id
Position
Project Id
Idle Time
Busy Rate
Try Count
Completed
Interview Time
Question Id
Question Time
Interviewer Status
Last Call Outcome
local_interviewer1 Pos1 TESTCATI 00:00:00 10% 0 0 00:00:00
local_interviewer2 Pos2 TESTCATI 00:00:00 20% 0 0 00:00:00
Remote_interviewer1 RPos8 TESTCATI 00:00:00 10% 0 0 00:00:00

The Interviewers tab contains two windows:

- The first window allows you to specify if, and how often, the Interviewers Real Time display is automatically refreshed.
- The second window is the **Interviewers Real Time display**, which contains one record for every user (interviewer) who has opened the Phone Participants activity and is working on a IBM® SPSS® Data Collection project that you can access.

An interviewer will remain listed in the Real Time display while Phone Participants remains open, even if there is no activity for a period of a day or more. When an interviewer closes Phone Participants, his or her record is removed from the Real Time display.

Note: If an interviewer reopens Phone Participants after it closes abnormally, the Real Time display might contain more than one record for that interviewer. The current record will have a lower value in the Session Time column. A record that isn't current will be removed automatically after one hour.

For each interviewer, the Real Time display shows a number of statistics, which are mostly of three types:

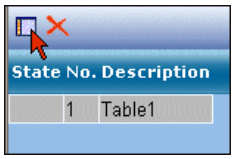
- Statistics that relate to the period since the interviewer last opened the Phone Participants activity. This period is sometimes referred to as "the current session".
- Statistics that relate to the interview currently in progress, if there is one.
- Statistics that relate to the current question being asked.

For more information about the statistics shown, see Columns in the Real Time Display.

You can change the Real Time display to show additional columns or to display the interviewer records in a different order. For more information, see the topic Customizing the Real Time Display on p. 276.

In the Real Time display, you can choose to monitor an interviewer who is conducting an interview. For more information, see the topic Monitoring an Interviewer on p. 278.

At the top of the main screen, there are some toolbar buttons, which are described in the following table:

Button	Description
	Refresh the contents of the Real Time display.
	Change the settings for the Real Time display. For more information, see the topic Customizing the Real Time Display on p. 276.
	Close Interviewer Monitoring and return to the IBM® SPSS® Data Collection Interviewer Server Administration main screen.

Columns in the Real Time Display

The following table describes the columns that can appear in the Interviewers Real Time display. By default, not all of these columns are displayed, but they can be added. For more information, see the topic Customizing the Real Time Display on p. 276.

Column Name	Description
Abandoned	The number of times the interviewer has selected the "Abandoned" call outcome since last opening the Phone Participants activity.
Busy Rate	The percentage of the Session Time that the interviewer has spent conducting interviews.
Completed	The number of interviews completed since the interviewer last opened the Phone Participants activity.
Contacts Since Last Survey	The number of participant records retrieved by the interviewer from the sample management system since the end of the previous interview.
Idle Time	The time elapsed since the interviewer last submitted a page, either by retrieving the next contact or pressing Next for an interview.
Interviewer ID	The interviewer's IBM® SPSS® Data Collection user name.
Interview Time	The time since the current interview was started. If the interview has been restarted, the time shown is that since the restart.
Is Monitored	Whether the interview is monitored.
Is Review	Whether the interview is reviewed.
Monitoring Allowed	Whether the participant has given his or her consent to be monitored.
Off Hook	Whether the interviewer's telephone is off hook. This information is shown only if the interviewer is using an autodialer to make calls.

Column Name	Description
Phone	The extension number used at the telephone interviewer station. This information is shown only if the interviewer is using an autodialer to make calls.
Position	The position name for the telephone interviewer station. This information is shown only if the interviewer is using an autodialer to make calls. Positions prefixed with an "R" indicate a remote interviewer.
Access Number	The telephone number of the remote interviewer. The value is blank for local interviewers.
Project ID	The Data Collection project name.
Project Type	The value is always Data Collection.
Question ID	The name of the current question.
Question Time	The time spent by the interviewer on the current question.
Interviewer Status	An icon displays whether the interviewer's status is Idle, Waiting, Connected, or Disconnected.
Last Call Outcome	The outcome of the last call completed by the interviewer; for example, "Refused" or "Completed".
Refused	The number of times the interviewer has selected the "Refused" call outcome since last opening the Phone Participants activity.
Session Time	The time since the interviewer last opened the Phone Participants activity.
Try Count	The number of interviews completed plus the number of times that the interviewer selected a call outcome since last opening the Phone Participants activity. This figure does not include participant records that the interviewer returned to the Sample Management system by clicking the Cancel Contact button.
Wait Time	For an interviewer waiting to be connected to a participant, the time since the interviewer clicked the Start Dialing button. This information is shown only if the interviewer is using an autodialer to make calls.

Customizing the Real Time Display

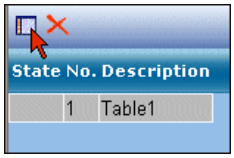
You can customize the following aspects of the Interviewers Real Time display:

- The number of interviewer records that appear on each page. By default, all the records are shown on a single page and you might have to use the scroll bar excessively to see all the records. If you specify a limit to the number of records on each page, you can use the navigation icons to move between pages.
- The columns that are shown, and in what order they appear.
- The sort order of the records. For example, you might want to sort the records into Project ID order so that it's easier to see all the interviewers working on a specific project.

To Customize the Real Time Display

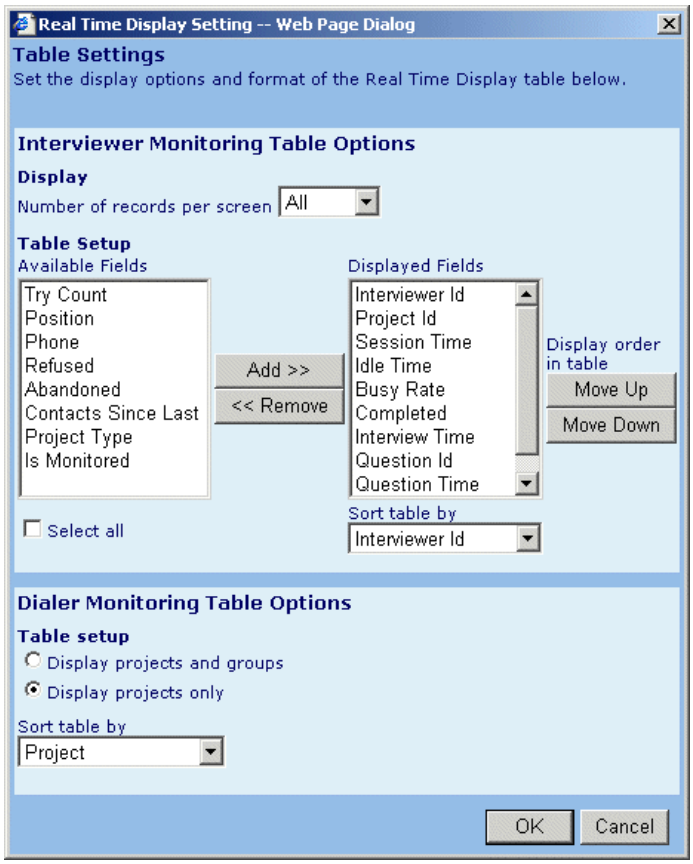
- In the toolbar at the top of the Interviewer Monitoring main page, click the Table Setup button as shown below:

Figure 1-66
Table Setup button



This opens the "Real Time Display Setting" dialog box as shown below:

Figure 1-67
Real Time Display Setting dialog box



- In "Display", select the number of records that you want to appear on each page in the Real Time display.

- In Table Setup, choose which columns will appear in the Real Time display as follows:
  - To add a column to those displayed, click on the column name in the Available Fields list and then click Add.
  - To remove a column from those displayed, click on the column name in the Displayed Fields list and then click Remove.

  Tip: In Table Setup, you can select multiple columns by pressing Ctrl or Shift while you click.
- In Table Setup, choose the order of the columns displayed in the Real Time display as follows.
  - To move a column towards the left of the page, click on the column name in the Displayed Fields list and then click Move Up.
  - To move a column towards the right of the page, click on the column name in the Displayed Fields list and then click Move Down.
- In the "Sort table by" drop-down list, select the column that will determine the order of the records in the Real Time display.
- When you have completed your changes, click OK. To undo your changes, click Cancel.

  The Real Time display will automatically refresh to show your changes.

  Note: For information about using the "Dialer Monitoring Table Options" settings, see "Customizing the Dialing Activity Display" in Monitoring Silent Calls.

Navigating the Real Time Display

By default, all interviewer records are displayed on a single page. However, you can customize the Interviewers Real Time display to display the records over multiple pages instead. If you have already done this, you will need to use the icons at the bottom of each page to navigate between pages. The icons are described in the following table:

Icon	Description
	Display the first page.
	Display the previous page.
[1] [2] [3] ...	Display page 1, page 2, page 3, and so on.
	Display the next page.
	Display the last page.

Monitoring an Interviewer

You can monitor an interviewer who is conducting an interview. When you monitor an interviewer, the question being asked and the previous question asked are displayed in the Monitor tab. When the interviewer navigates to another question, the Monitor tab will automatically refresh to show that question. When the interview finishes, the Monitor tab will show the call outcome selected by the interviewer. If the interviewer then starts another interview, the Monitor tab will refresh to show the first question of the new interview.

Because the Monitor tab is refreshed only when the interviewer navigates to another question, you cannot see the answer to the current question as it is being entered by the interviewer. However, the answer (if any) to the previous question is displayed, as is the answer to the current question if it was asked earlier in the interview.

You can pause monitoring, for example, if you need more time to read a text response. When you resume monitoring, and if the interview is still in progress, your screen will refresh to show the current question being asked. You cannot choose which questions to view.

Note: You can monitor interviewers even when the interviewer selects No for the Contact agrees to be monitored and recorded option in Phone Participants. This setting controls when the interview should not be monitored by external parties, not when the interview can be reviewed by a supervisor.

Audio Monitoring

If an interviewer is using an autodialer to make calls, and your station is connected to the same autodialer, you can listen to the interview as well as watch it. You will hear both the interviewer and the participant.

Note: Depending on the settings for the project that you are monitoring, interviews might also be recorded and saved to sound files. For more information, see Autodialer Settings.

Selecting an Interviewer to Monitor

In the Interviewers Real Time display, an icon is displayed to the left of each interviewer to indicate whether monitoring is possible. Each icon is described in the following table:

Icon	Description
	Both visual and audio monitoring are possible.
No icon displayed	Only visual monitoring is possible.
	Another supervisor is monitoring this interviewer.
	Either the participant did not give his or her consent to be monitored, or the project settings specify that monitoring is never allowed. However, as local laws sometimes allow monitoring by someone within the same legal entity as the interviewer (for example, a supervisor who works for the same organization as the interviewer), monitoring is still possible. In addition, this icon will also be displayed if the interviewer is reviewing an interview.

The Monitoring Allowed column in the Real Time display will also tell you if an interviewer can be monitored. If the Monitoring Allowed column is not shown, you can add it. For more information, see the topic Customizing the Real Time Display on p. 276.

To Select an Interviewer to Monitor

- In the Interviewers Real Time display, click on the record of an interviewer who can be monitored.

The interviewer record is highlighted.

Note: If the Real Time display contains more than one record for the same interviewer (which can occur if the Phone Participants activity closes abnormally), click on the record that has a lower value in the Session Time column. If you do not click on the correct record, you will not see any interviews when the Monitor tab opens.

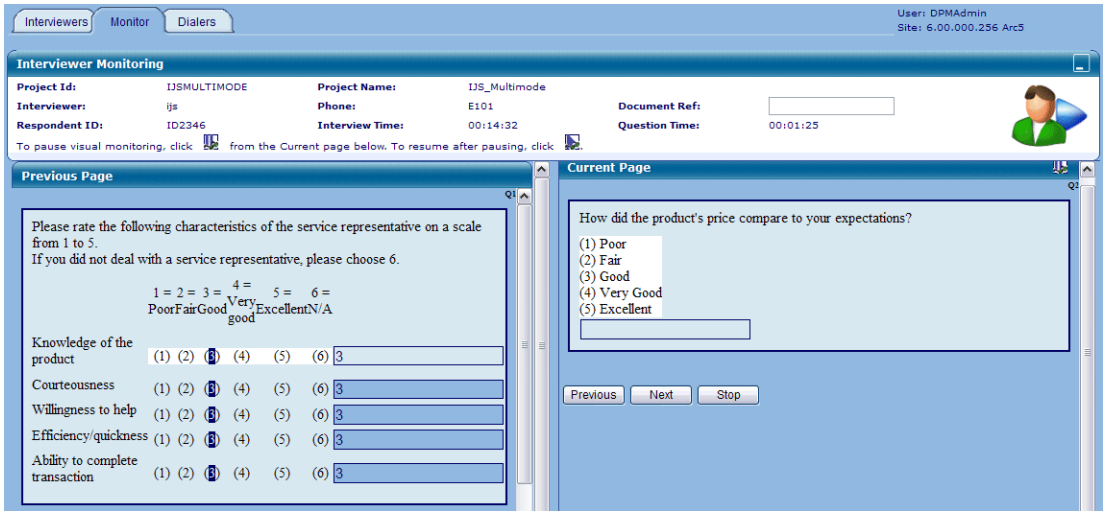
▶ In the upper right of the Real Time display, click on the Monitor button as shown below:

Figure 1-68
Monitor button

The Monitor tab opens and the current question is displayed.

The Monitor Tab

Figure 1-69
Monitor tab



The Monitor tab is divided into two sections:

- The top half of the screen shows the interviewer's IBM® SPSS® Data Collection Interviewer Server Administration user name, the name of the IBM® SPSS® Data Collection Interviewer Server project, the time since the current interview was started, the time spent by the interviewer on the current question, and a graphic that shows the interviewer's current status.
- The bottom half of the screen contains two windows where the current and previous questions are displayed. If a question is too big to fit in the window, scroll bars will appear. If the participant did not give his or her consent to be monitored, or if the project settings specify that monitoring is never allowed, or if the interviewer is reviewing the interview, the following icon will be displayed:

Figure 1-70
Icon to indicate that monitoring is not allowed

Note: In the windows showing the current and previous questions, it's possible (but not recommended) to modify the answers and click on the navigation buttons. This has no effect on the interview in progress, but might cause the question to disappear from your screen. Your screen will be refreshed when the interviewer navigates to another question.

Interviewer Server Administration automatically creates an audit record in the mrUserData database to store details about the period in which you have the Monitor tab open. This period is sometimes referred to as "the monitoring session". To add a comment to the audit record, type it in the Document Ref field in the top half of the Monitor tab. When you navigate away from the Monitor tab, your comment is added to the audit record. For more information, search the IBM® SPSS® Data Collection Developer Library documentation for the topic "Interviewer Server Administration Audit Trail".

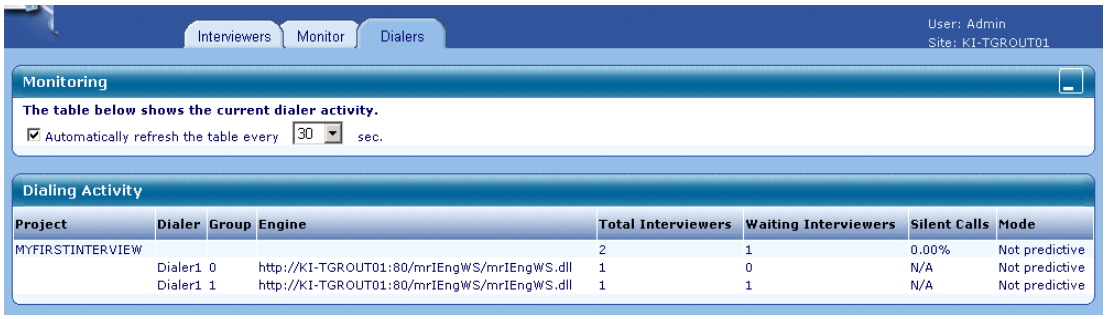
The bottom half of the Monitor tab also contains some buttons, which are described in the table below:

Button	Description
	Pause monitoring. Note that this button pauses visual monitoring, but does not mute audio monitoring.
	Resume monitoring.

Monitoring Silent Calls

If the IBM® SPSS® Data Collection Interviewer Server projects that you have access to use an autodialer, you can monitor the percentage of silent calls that are occurring for each project. Silent calls can occur when an autodialer generates more calls than there are interviewers available to handle the calls. For any of the listed projects, you can also reset the silent calls figure to zero.

Figure 1-71
Dialers tab



You use the Dialers tab to monitor the autodialer activity for each project. The columns shown in the Dialing Activity display on the Dialers tab are described in the following table.

Column	Description
Project	The name of the Interviewer Server project.
Dialer	The name of the autodialer being used by this dialing group.

Column	Description
Group	The ID number of the dialing group. A dialing group is shown only if the project is using an autodialer in predictive or group mode. If the project uses interviewer qualifications, there will be a separate dialing group for each collection of interviewers with the same qualifications.
Engine	The URL of the interview session engine being used by this dialing group.
Total Interviewers	The number of interviewers who are using an autodialer.
Waiting Interviewers	The number of interviewers who are using an autodialer and are waiting to be connected to a participant. This figure is shown only if the project is using the autodialer in predictive or group mode.
Silent Calls	The percentage of silent calls that are occurring. This figure is shown only if the project is using an autodialer in predictive or group mode. The figure is an average of the silent call percentage figures for all of the interview session engines being used by this project. Each engine's silent call percentage figure is based on the period since the engine was last restarted or the percentage figure was last reset.
Mode	The current dialing mode being used by the autodialer. The possible values are Predictive, Not predictive, and Extension. For more information about the difference between predictive, not predictive (group), and extension dialing, use the search function in the IBM® SPSS® Data Collection Developer Library documentation to search for the text "How Does Autodialing Work" and in the search results open the topic with that title.

Customizing the Dialing Activity Display

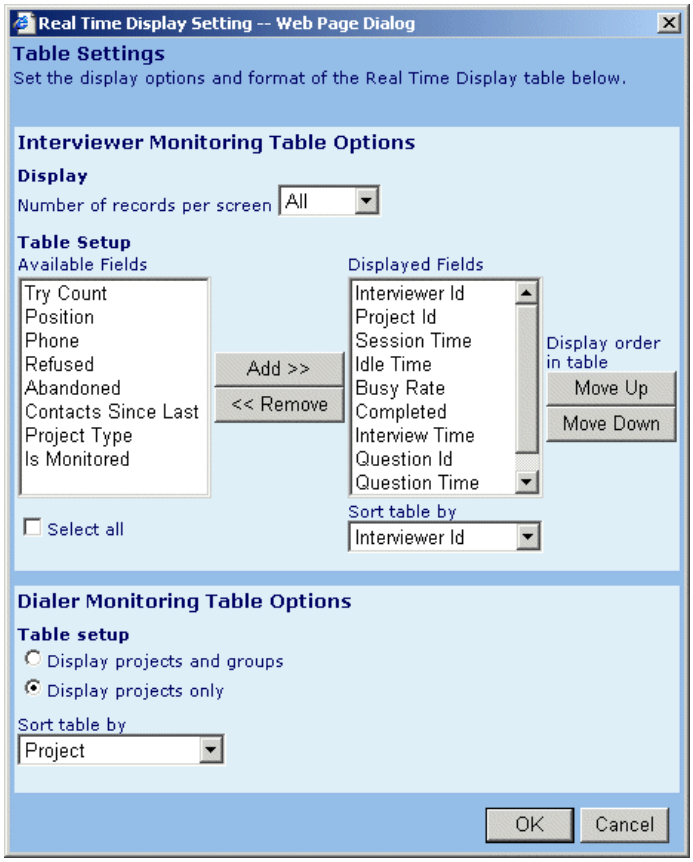
You can change the Dialing Activity display to show or hide the dialing groups associated with each Interviewer Server project. If dialing groups are hidden, the Dialer, Group, and Engine columns will not appear in the Dialing Activity display.

- In the toolbar at the top of the Interviewer Monitoring main page, click the Table Setup button as shown below:

Figure 1-72
Table Setup button

This opens the "Real Time Display Setting" dialog box as shown below:

Figure 1-73
Real Time Display Setting dialog box



- In Dialer Monitoring Table Options, choose whether you want to display projects and their associated dialing groups, or just the projects.
- In the "Sort table by" drop-down list, choose the sort order of the projects in the Dialing Activity display.
- Click OK.

Note: For information about using the other settings in the "Real Time Display Setting" dialog box, see Customizing the Real Time Display.

Resetting the Silent Calls Percentage

To set a project's silent calls figure to zero, open the Phone Surveys activity for the project and click the Reset Statistics button on the Dialer Settings tab. For more information, see Autodialer Settings.

Dialer Administration

You use the Dialer Administration activity to allow your telephone interviewing projects to use an autodialer. An autodialer is a computer that automatically dials the phone numbers of participants to generate calls for interviewers. Your call center might use one or more autodialers.

IBM® SPSS® Data Collection supports the IBM® SPSS® Data Collection Dialer and QTC autodialers. For more information about how IBM® SPSS® Data Collection Interviewer Server interfaces with an autodialer, search the IBM® SPSS® Data Collection Developer Library documentation for the topic "The Dialer Interface Component".

Using an autodialer involves the following steps:

1. Creating a dialer configuration file, which contains one entry for each autodialer and one entry for each station that will use an autodialer.
2. Importing the dialer configuration file into the Dialer Administration activity.
3. Inputting a position name on each station, which will allow the autodialer to identify the station.
4. Connecting to the autodialer, so that it is able to generate calls for interviewers.

   You can also use the Dialer Administration activity to monitor the number of active calls on each autodialer and to disconnect from an autodialer.

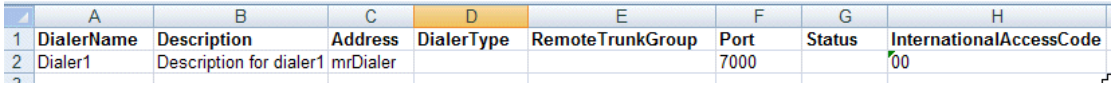
Note: To use an autodialer, you also need to specify for each of your telephone interviewing projects that an autodialer should be used. For more information, see Interview Settings.

Creating a dialer configuration file

A dialer configuration file is a Microsoft Excel spreadsheet that contains two worksheets named Dialers and Positions. To help you create your first dialer configuration file, an example spreadsheet called *DialerConfiguration.xls* is included with the IBM® SPSS® Data Collection Developer Library and, by default, is installed in folder *[INSTALL_FOLDER]\IBM\SPSS\DataCollection\6\DDL\Administration Tools*.

Dialers worksheet

You define each autodialer on a separate row of the Dialers worksheet. The first row must contain the column headings.



	A	B	C	D	E	F	G	H
1	DialerName	Description	Address	DialerType	RemoteTrunkGroup	Port	Status	InternationalAccessCode
2	Dialer1	Description for dialer1	mrDialer			7000		00

The following table describes the columns in the Dialers worksheet:

Column	Description
DialerName	A name that uniquely identifies the autodialer. For example, ChicagoDialer03.
Description	A free-format description of the autodialer.
Address	The network address of the autodialer. For example, an IP address.

Column	Description
DialerType	When utilizing a 3rd party dialer, this value must match the property collection that is added by the specific 3rd party dialer install kit.
RemoteTrunkGroup	Identifies a particular ISDN trunk to support connecting remote interviewers and/or supervisors. This setting can be overridden in the sample management script.
Port	The port number to use on the autodialer.
Status	The worksheet does not need to include this column. However, to avoid having to manually connect to the autodialer after importing the dialer configuration file, set the value to Active.
InternationalAccessCode	The international access code that the autodialer should use to replace the plus (+) at the start of international phone numbers. If you enter an international access code that starts with one or more zeroes, make sure that you format this column as Text so that the leading zeroes are preserved.

Positions worksheet

You define each position on a separate row of the Positions worksheet. The first row must contain the column headings.

	A	B	C	D	E	F
1	**Position**	**DialerName**	**RemoteTrunkGroup**	**Extension**	**Description**	**AccessNumber**
2	Pos1	Dialer1		E101	Interviewer Extension Pos1	
3	Pos2	Dialer1		E102	Interviewer Extension Pos2	
4	Pos3	Dialer1		remote	Remote Interviewer Extension Pos3	15555555432
5	Pos4	Dialer1		remote	Remote Interviewer Extension Pos4	15555552345
6	Pos5	Dialer1		manual	Manual Station	
7	Pos6	Dialer1		manual	Manual Station	
8	Pos7	Dialer1		modem	Modem Station	
9	Pos8	Dialer1		modem	Modem Station	
10	Pos9	Dialer1		E109	Interviewer Extension Pos9	

The following table describes the columns in the Positions worksheet:

Column	Description
Position	A name that uniquely identifies the position. For example, R02-S18 for station 18 in room 2. Remember that someone will have to enter this name on the corresponding telephone interviewer or supervisor station, so do not make names too long or difficult to type. For more information, see the topic Setting up stations to use an autodialer on p. 287. The maximum Position length is 80 characters.
DialerName	The autodialer that will be used by this position. For example, ChicagoDialer03. This value must match one of the entries in the DialerName column in the Dialers worksheet.
RemoteTrunkGroup	Identifies a particular ISDN trunk to support connecting remote interviewers and/or supervisors. This setting can be overridden on a per position basis. If this setting is not specified for the position, the dialer's RemoteTrunkGroup should be used. If RemoteTrunkGroup is not set for the dialer, a trunk group should not be specified when establishing the remote connection (it will be left to the dialer to determine which trunk group to use). Interviewers cannot specify the RemoteTrunkGroup value.

Column	Description
Extension	The telephone extension used at this position. For the IBM® SPSS® Data Collection Dialer and QTC autodialers, extensions must be entered in the format Ennn, for example, E101 or E123. To specify that this position is not able to use an autodialer, set the value to either Modem or Manual, which defines that only modem or manual dialing can be used at this position. If the position will be used by a supervisor for interviewer monitoring, an extension must be specified. When using Remote Interviewing, this property must be defined as "remote". The maximum Extension length is 40 characters.
Description	A free-format description of the position. The worksheet does not need to include this column.
AccessNumber	The telephone number of the remote interviewer. The maximum AccessNumber length is 50 characters (the characters < and > are not valid).

Starting Dialer Administration

▶ From the IBM® SPSS® Data Collection Interviewer Server Administration menu, choose:
Phone > Dialer Administration

The Dialer Administration main screen opens.

Importing a dialer configuration file

In Dialer Administration, you add autodialers or update the information for existing autodialers by importing a dialer configuration file. This file contains one entry for each autodialer and one entry for each station that will use an autodialer. For more information, see the topic Creating a dialer configuration file on p. 284.

Before you import a dialer configuration file, be aware of the following:

- An existing autodialer that has the same name as an entry in the file will be overwritten.
- An existing autodialer that does not have the same name as any entry in the file is unaffected, that is, it is not removed. To remove an autodialer, see Connecting to and disconnecting from an autodialer.
- Any existing autodialers that are to be overwritten must be in the Stopped or Failed state, otherwise the import will fail.

Importing a dialer configuration file

▶ Make sure that any existing autodialers that are to be overwritten are in the Stopped or Failed state.

▶ At the top of the Dialer Administration main screen, click the Import button as shown below:

The Upload Files dialog box opens.

▶ Click Browse and select the file that you want to import.

▶ On the Upload Files dialog box, click Upload.

The dialer entries in the configuration file are validated and imported. The real-time display is refreshed and any new or updated autodialers are shown. However, if the validation failed, the import stops and an error message is displayed.

Setting up stations to use an autodialer

If one or more autodialers have been added to the Dialer Administration activity, every telephone interviewer station (that is, any computer on which the Phone Participants activity will be used) must be assigned one of the position names that you defined in your dialer configuration file. When an interviewer asks to be connected to a participant, IBM® SPSS® Data Collection Interviewer Server uses the position name to route the request to the appropriate autodialer. When a call has been successfully generated, the autodialer connects the participant to the extension number specified for that position name so that the interviewer can speak to the participant.

If a station has not been assigned a recognized position name, it cannot be used for autodialing. For projects that use an autodialer, you can choose whether the station can still be used to conduct interviews by manual dialing—see "Stations with Unrecognized Position Names" later in this topic.

You must also assign position names to supervisor stations that will be used for either audio monitoring of interviewers or for reviewing interviews that include audio recordings—see "Stations used for Audio Monitoring" and "Stations used for Reviewing Interviews" later in this topic.

Assigning position names

Position names are assigned to telephone interviewer stations in one of two ways:

- **By an administrator.** Make sure that you have been assigned the Phone Participants activity feature "Can set up interviewer stations". Then open Phone Participants on each station and, when prompted, enter the appropriate position name. For example, the name might be R02-S18 for the computer at seat 18 in room 2. This needs to be done only once on each station. Any interviewers who subsequently use the station (and who have not been assigned "Can set up interviewer stations") will not be prompted for a position name.
- **By the interviewer.** Assign the Phone Participants activity feature "Can set up interviewer stations" to telephone interviewers. Every time that an interviewer opens Phone Participants, he or she must either confirm the position name entered by the previous user or enter a new position name.

Depending on your requirements, you can use the same method for all interviewers or use the first method for some interviewers and the second method for others.

For more information about assigning to the activity feature "Can set up interviewer stations", search the *IBM® SPSS® Data Collection Interviewer Server Administration User's Guide* for the topic "Assigning Users or Roles to Activity Features".

Stations with unrecognized position names

When a position name is entered in Phone Participants, Interviewer Server validates the name against those defined in the Dialer Administration activity. If Interviewer Server does not recognize the name, the station cannot use autodialing.

For projects that use an autodialer, you can specify whether stations with unrecognized positions can still be used to conduct interviews (that is, Phone Participants will still open). If so, manual dialing must be used on those stations. For more information, see Autodialer Settings.

Stations used for audio monitoring

If you intend to use the Interviewing Monitoring activity in Interviewer Server and want audio monitoring to be available, you must assign a valid position name to each station on which the Interviewing Monitoring activity will be opened. When a supervisor starts monitoring an interviewer, the autodialer will connect the interviewer's telephone call to the extension number associated with the position so that the supervisor can hear the interview. Note that audio monitoring is possible only when the interviewer's and supervisor's positions are associated with the same autodialer.

Position names are assigned to stations used for audio monitoring in one of two ways:

- **By an administrator.** Make sure that you have been assigned the Interviewer Monitoring activity feature "Can set up supervisor stations". Then open Interviewer Monitoring and, when prompted, enter the appropriate position name. This needs to be done only once on each station. Any supervisors who subsequently open Interviewer Monitoring on that station (and who have not been assigned "Can set up supervisor stations") will not be prompted for a position name.
- **By the supervisor.** Assign the Interviewer Monitoring activity feature "Can set up supervisor stations" to supervisors. Every time that a supervisor opens Interviewer Monitoring, he or she must either confirm the position name entered by the previous user or enter a new position name.

For more information about assigning to the activity feature "Can set up supervisor stations", search the *Interviewer Server Administration User's Guide* for the topic "Assigning Users or Roles to Activity Features".

Stations used for reviewing interviews

If you intend to use the Review Interviews activity in Interviewer Server and want to be able to listen to audio recordings of participants' answers, you must assign a valid position name to each station on which the Review Interviews activity will be opened.

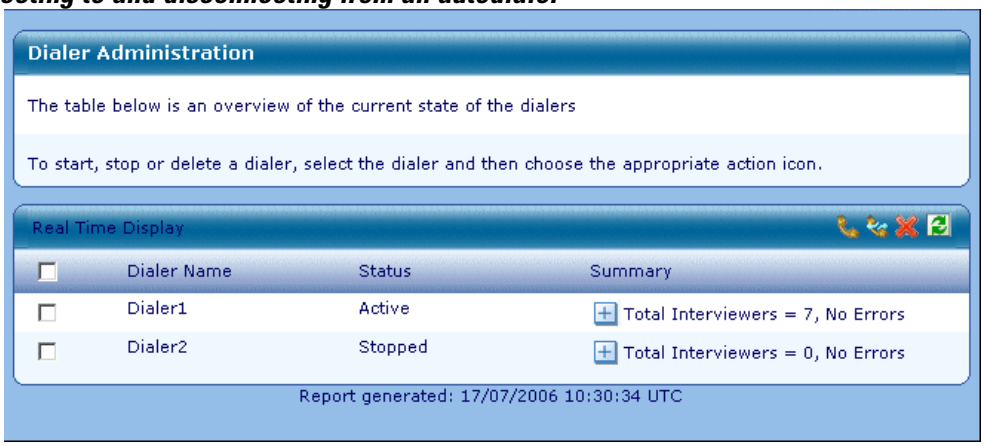
Position names are assigned to stations used for reviewing interviews in one of two ways:

- **By an administrator.** Make sure that you have been assigned the Review Interviews activity feature "Can set up supervisor stations". Then open Review Interviews and, when prompted, enter the appropriate position name. This needs to be done only once on each station. Any supervisors who subsequently open Review Interviews on that station (and who have not been assigned "Can set up supervisor stations") will not be prompted for a position name.

  Note: If a station is being used for both audio monitoring and reviewing interviews, you do not need to carry out the above step if you have already carried out the equivalent step in "Stations used for Audio Monitoring" above.
- **By the supervisor.** Assign the Review Interviews activity feature "Can set up supervisor stations" to supervisors. Every time that a supervisor opens Review Interviews, he or she must either confirm the position name entered by the previous user or enter a new position name.

For more information about assigning to the activity feature "Can set up supervisor stations", search the *Interviewer Server Administration User's Guide* for the topic "Assigning Users or Roles to Activity Features".

Connecting to and disconnecting from an autodialer


Dialer Administration
The table below is an overview of the current state of the dialers
To start, stop or delete a dialer, select the dialer and then choose the appropriate action icon.
Real Time Display
Dialer Name
Status
Summary
Dialer1
Active
Total Interviewers = 7, No Errors
Dialer2
Stopped
Total Interviewers = 0, No Errors
Report generated: 17/07/2006 10:30:34 UTC

You can use the Dialer Administration main screen to carry out the following tasks:

- Connect to an autodialer, so that it is able to generate calls for telephone interviewers.
- Disconnect from an autodialer, so that it is no longer able to generate calls.
- Remove an autodialer from the Dialer Administration activity.
- Check the status of an autodialer.

Note: To use an autodialer, you also need to specify for each of your telephone interviewing projects that an autodialer should be used. For more information, see Interview Settings.

The real-time display

The real-time display contains one record for each autodialer and shows information such as the number of active calls on an autodialer or the number of times that the connection to the autodialer has failed. The fields shown in the real-time display are described in the following table:

Field	Description
Dialer	The autodialer name as specified in the dialer configuration file.
State	The current state of the autodialer, which might be Starting, Active, Stopping, Stopped, or Failed.
Status	For an autodialer in the Active state, this field shows the number of interviewers who are dialing a participant or who are connected to a participant. To see the number of interviewers by project, expand the node to the left of the status. For an autodialer in the Failed state, this field shows the number of times that the connection to the autodialer has failed.

The top-right of the real-time display contains buttons that can be used for various tasks. The buttons are listed in the following table:

Button	Description
	Connect to this autodialer.
	Disconnect from this autodialer.
	Remove this autodialer from the Dialer Administration activity.
	Refresh the real-time display.

Note: The real-time display is refreshed only when you click one of these buttons. Click the Refresh button periodically to keep the display up-to-date.

Connecting to and disconnecting from an autodialer

When you connect to an autodialer, it is able to generate calls for telephone interviewers that request them. When you disconnect from an autodialer, it is no longer able to generate calls, but it does allow any active calls to finish. If a telephone interviewer requests a call when the autodialer's current state is Stopped or Failed, a message will explain that the autodialer is unavailable.

Connecting to an autodialer

- In the Real-Time display, select the check box on the left of the autodialer you want to connect to. Only select an autodialer if its current state is Stopped or Failed.

  Tip: To connect to more than one autodialer, select more than one check box. To select all autodialers, select the check box on the left of the header row.

- Click the Start button as shown below:

  The autodialer state changes to Starting and after a short pause changes to Active. The autodialer is now able to generate calls.

Disconnecting from an autodialer

- In the Real-Time display, select the check box on the left of the autodialer you want to disconnect from. Only select an autodialer if its current state is Active.

  Tip: To disconnect from more than one autodialer, select more than one check box. To select all autodialers, select the check box on the left of the header row.

- Click the Stop button as shown below:

  The autodialer state changes to Stopping and the autodialer is no longer able to generate calls. When all active calls have come to an end, the autodialer state changes to Stopped.

Autodialer removal

You can remove an autodialer from the Dialer Administration activity. Before you do this, be aware of the following:

- If you need to restore an autodialer after removing it, you must import a dialer configuration file that contains an entry for that autodialer.
- When you remove an autodialer, all positions specified for that autodialer are also removed. To continue to use autodialing at those positions, you must associate them with another autodialer. For more information, see the topic Creating a dialer configuration file on p. 284.
- You cannot remove an existing autodialer by deleting its entry from a dialer configuration file and importing that file. Instead, follow the steps below to remove an autodialer.

Removing an autodialer

▶ In the Real-Time display, select the check box on the left of the autodialer that you want to remove. Only select an autodialer if its current state is Stopped or Failed.

▶ Click the Delete button as shown below:

The real-time display is refreshed and the autodialer is no longer shown.

Closing Dialer Administration

▶ On the main screen, click the Exit button as shown below:

Dialer certification

Marketing Systems Group Pro-T-S dialer

Table 1-1
Marketing Systems Group Pro-T-S dialer certification

Feature	Status	Comments
Power Dialing	Passed	
Group Dialing	Passed	
Dialer Administration	Passed	
PhoneInterviewing Login	Passed	
Call Outcomes	Passed	
Dialer Settings	Passed	
Interviewer Qualification	Passed	
Review Audio	Passed	
Answering Machine Detection	Passed	
VoIP	Passed	
Phone Reports	Passed	
Remote Mode	Passed	
Fail-Over	Passed	

Feature	Status	Comments
Load Test	Passed	50 concurrent interviews
Benchmark	N/A	

The Marketing Systems Group Pro-T-S dialer group dialing load test, with 50 concurrent interviews, details are provided below:

- **Server version:**IBM SPSS Data Collection Server 6 Patch 1
- **Marketing Systems Group Pro-T-S installation kit:** Beta version 3
- **Concurrent interviews:** 50
- **Loading mode:** 1 interview per 5 seconds
- **Duration:** 120 minutes
- **Project:** Multimode
- **Dialing mode:** Marketing Systems Group Pro-T-S group dialing
- **Dialer status:** Marketing Systems Group Pro-T-S demo dialer (50 local extensions and 10 remote extensions)

Table 1-2
Timing results

Timing	Max	Average
Time to login to IBM® SPSS® Data Collection Interviewer Server Administration	1.065672	0.8497719
Time to start Phone Participants	2.019375	1.716981
Wait time	22.7458	3.140847
Time to start interview	6.714832	0.2868351

Sytel dialer

Table 1-3
Sytel dialer certification

Feature	Status	Comments
Power Dialing	Passed	
Group Dialing	Passed	
Dialer Administration	Passed	
PhoneInterviewing Login	Passed	
Call Outcomes	Passed	
Dialer Settings	Passed	
Interviewer Qualification	Passed	
Review Audio	Passed	
Answering Machine Detection	Passed	
VoIP	Passed	
Phone Reports	Passed	
Remote Mode	Passed	
Fail-Over	Passed	
Load Test	Passed	50 concurrent interviews
Benchmark	N/A	

The Sytel dialer group dialing load test, with 50 concurrent interviews, details are provided below:

- **Hardware environment:** Single machine - Intel Core 1.86Ghz, 4GB RAM
- **Software environment:** Microsoft Windows Server 2003, Microsoft SQL Server 2005
- **Server version:**IBM SPSS Data Collection Server 6 Patch 1
- **Sytel dialer version:** 1.0.9
- **Concurrent interviews:** 50
- **Loading mode:** 1 interview per 2 seconds
- **Duration:** 120 minutes
- **Project:** Multimode
- **Dialing mode:** Sytel group dialing

Table 1-4
Timing results

Timing	Min	Max	Average	Std Dev
Time to login to Interviewer Server Administration	0.82	1.45	0.97	0.98
Time to start Phone Participants	1.46	2.22	1.73	1.74
Wait time	0.23	4.15	0.40	0.43
Time to start interview	0.22	2.05	0.26	0.27

Interviewing Activity Reports

You use the Interviewing Activity Report to monitor the current status of the session engines that are responsible for running interviews. Depending on the size of your site and the way it has been set up, you may have one session engine that runs all interviews for all projects, or you may have a number of engines that share the interview load between them.

When a new interview starts and there is more than one session engine running, IBM® SPSS® Data Collection Interviewer Server generally allocates the interview to the least busy session engine. Your IBM® SPSS® Data Collection administrator can control how the system determines which is the least busy engine. Sometimes it will be the engine that is actually doing the least work, at other times engines that are already running interviews for the current project may take precedence over other engines, even if those engines are less busy. This is why you may see new interviews being allocated to engines that are not necessarily the least heavily loaded.

By running the Interviewing Activity Report and regularly updating it to get the latest figures, you can monitor how busy the session engines are and can anticipate possible load problems. The point to bear in mind is that the higher the load (that is, the busier the engine is), the more slowly interviews will run. If an engine reaches or exceeds 100% loading and Interviewer Server allocates another interview to it, that interview will fail with a message saying that the server is busy.

The report includes all session engines even if they are not currently registered. This does not always indicate a problem. It may be that an engine has been unregistered for Web (inbound) interviews but can still be used to run telephone interviews.

Sometimes an engine may fail while interviews are in progress. When this happens, those interviews are automatically transferred to a different engine (the respondent or interviewer is not normally aware of this). The report will show that the engine has failed and you will see the

information for other engines change accordingly (for example, you may see that a previously unused engine has now taken over some of those interviews).

You can look at interviewing activity in two ways:

- Engine status reports the status of each engine, showing which engines are running which projects and how busy they are.
- Project status reports the status of each project, showing the engines on which interviews for each project are running.

Both reports show the current numbers of live and test interviews per project. If interviews are taking place on projects to which you do not have access, the information about those interviews and projects is summarized in a single Other Projects entry.

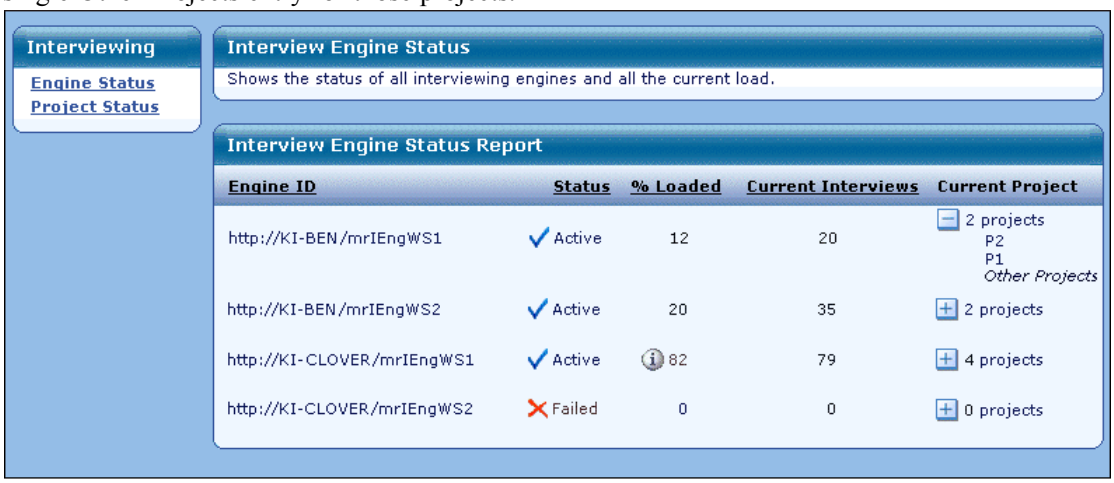
Starting the Interviewing Activity Report

▶ From the menu, choose:
Tools > Interviewing Activity

The page displays a table showing the status of each interviewing engine.

Engine Status

The Engine Status report takes each engine in turn and reports the percentage loading (that is, how busy it is, where fully loaded is 100%), how many interviews are currently running, and how many projects this covers. You can expand the projects count to see the project names if you wish. If an engine is running interviews for projects that you cannot access, the report shows a single Other Projects entry for those projects.



The report uses two icons to mark engines whose load is high or excessively high:

	The engine's load is currently greater than 80%. The engine can still function normally with this load, but interviews may start to slow down.
	The engine's current load is greater than 95%. This is excessively high and interviews will not run as quickly as they should. If you regularly see this icon in your reports, tell your IBM® SPSS® Data Collection administrator as he/she may be able to adjust the way in which interviews are allocated to session engines.

Note: The load figures of 80% and 95% are defaults. Your Data Collection administrator can tell you what the figures are for your site.

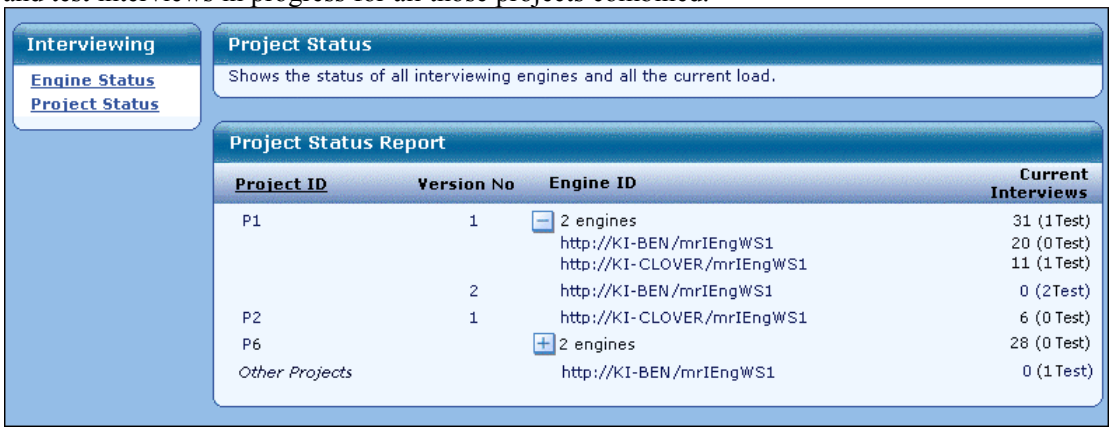
The report is a snapshot of activity at the point you request it. Refresh the report periodically to see up to date figures.

To View the Engine Status Report

- In the Interviewing frame, click Engine Status.
- To see the names of the names of the projects for which interviews are running, click the "plus" button to the left of the projects count. To return to the summary display, click the "minus" button.

Project Status

The Project Status report covers all projects for which interviews are currently in progress. The report shows the project's name, the version of the questionnaire file being used, the number of engines that are running interviews for that project, and the number of live and test interviews in progress. If interviews are in progress for projects that you cannot access, the report shows an Other Projects entry for the engines running those interviews. This gives the total number of live and test interviews in progress for all those projects combined.



The report is a snapshot of activity at the point you request it. Refresh the report periodically to see up to date figures.

To View the Project Status Report

- In the Interviewing frame, click Project Status.
- To see the names of the names of the engines that are running a project's interviews, click the "plus" button to the left of the engines count. To return to the summary display, click the "minus" button.

Refreshing the Report

- Click the Refresh button.

Manage Logs

IBM® SPSS® Data Collection Interviewer Server Administration and the activities and applications that run inside it create a number of log files that provide an audit trail of what each activity has done. If you experience problems with IBM® SPSS® Data Collection Interviewer Server, the IBM® SPSS® Data Collection administrator or a IBM Corp. support representative will need to look at these files to find out what is causing the problems. In a small installation where everything is installed on a single machine, all the log files will be stored in a single folder and can be viewed easily using any text editor. On clustered installations, log files are created on each machine in the cluster, which makes viewing them and matching up records between files quite difficult.

Manage Logs provides an easy method of viewing log files, and can be used to create a zip file containing logs of your choice for sending to an IBM Corp. support representative if you have problems that need investigation.

Note: Although the primary purpose of log files is to record events, some log entries may contain actual data or respondent details or references that enable data or respondent details to be extracted from other files. In addition, log files are not project specific and many log entries contain the project name, making it easy to locate information for a particular project.

Since these things are likely to be security issues in companies that provide Data Collection services to a number of external clients or where different teams work on different clients' projects, this first release of Manage Logs is available only to Data Collection administrators. It is planned that future releases will automatically filter log entries so that users see only the entries that refer either to the system as a whole or to their own projects. Administrators will, of course, still have access to all records.

Starting Manage Logs

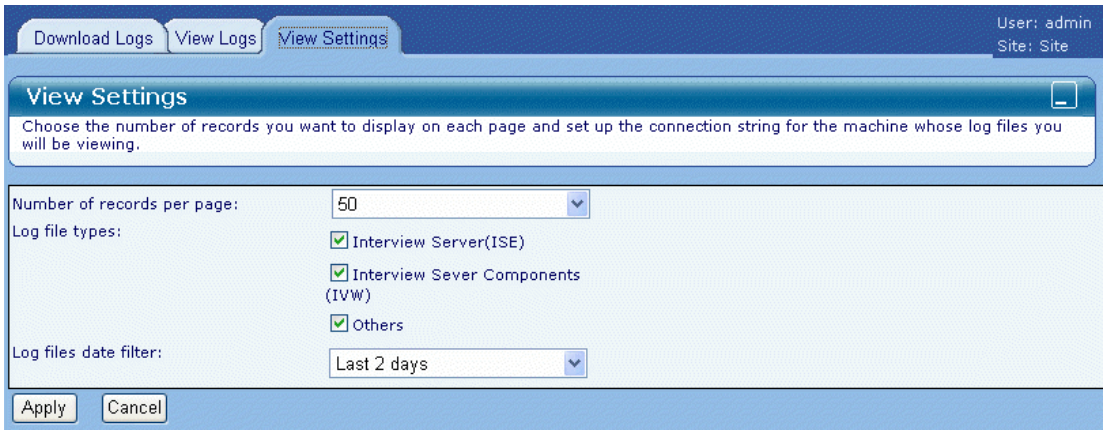
- From the IBM® SPSS® Data Collection Interviewer Server Administration menu, choose Tools > Manage Logs

View Settings

The View Settings tab is where you specify the types of records you want to view and the number of records to display per page. You can also specify a date range. This applies to the log files themselves, not to the records they contain. The start date is the date on which the file was created

and the end date is the date that the file was last modified. Some log files grow more quickly than others, so in order to see records for a problem that arose on 26 October you may need to request log files for the period 20 to 27 October to see everything that happened.

Figure 1-74
View Settings tab



To Specify the View Settings

- Select the View Settings tab.
- In Number of records per page, choose whether to display 50, 100, 500, or 800 records per page.
- In Log file types, choose the log files whose records you want to see.

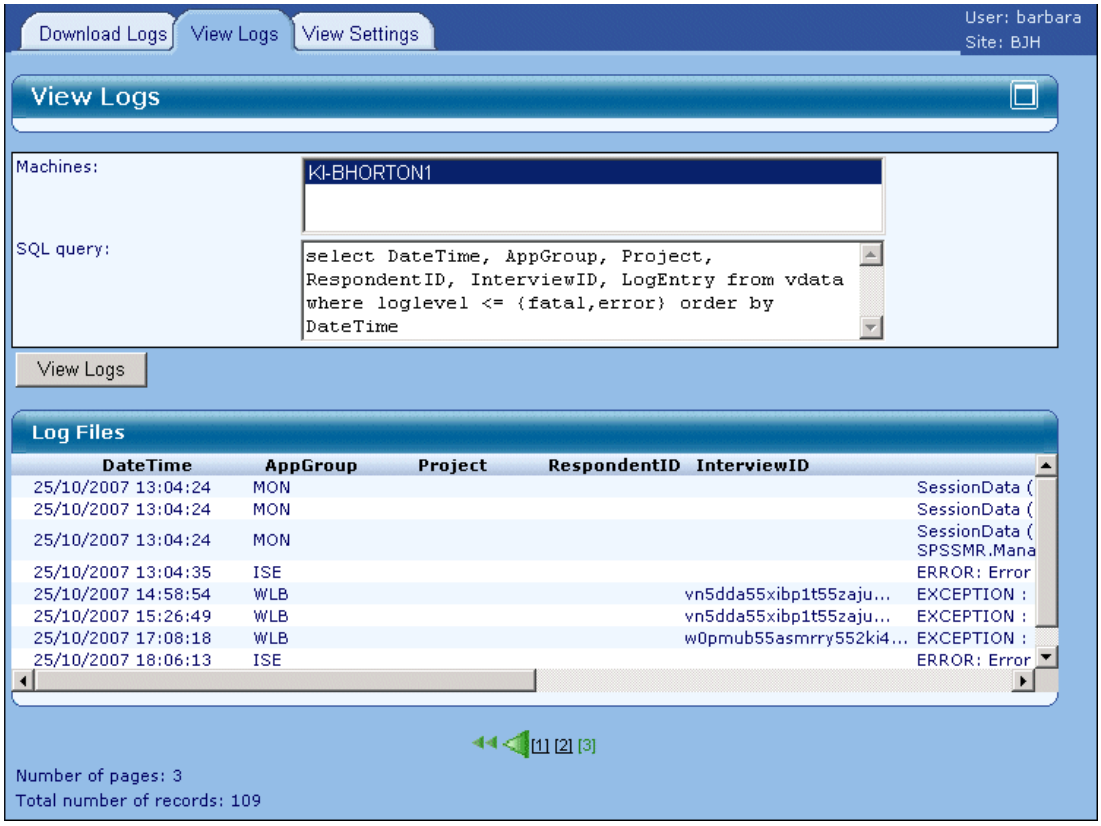
Select	For
IBM® SPSS® Data Collection Interviewer Server (ISE)	Records related to the interview engine.
Interviewer Server Components (IVW)	Records related to interviews.
Others	Records from log files for other activities such as Participants or Export Data.

- In Log files date filter, choose the date range for the files you want to use. Possibilities are the last two, 12, or 24 hours, the last two days, or the last week. The default is the last two days. If you would rather specify your own date range, select Custom and then choose the start and end dates in the new fields that Manage Logs displays.
- Click Apply to save your changes.

Viewing Log Files

User the View Logs tab to look at individual records in log files.

Figure 1-75
View Logs tab


Download Logs
View Logs
View Settings
User: barbara
Site: BJH
View Logs
Machines:
KI-BHORTON1
SQL query:
select DateTime, AppGroup, Project, RespondentID, InterviewID, LogEntry from vdata where loglevel <= (fatal,error) order by DateTime
View Logs
Log Files
DateTime AppGroup Project RespondentID InterviewID
25/10/2007 13:04:24 MON SessionData (
25/10/2007 13:04:24 MON SessionData (
25/10/2007 13:04:24 MON SessionData (SPSSMR.Mana
25/10/2007 13:04:35 ISE ERROR: Error
25/10/2007 14:58:54 WLB vn5dda55xibp1t55zaju... EXCEPTION :
25/10/2007 15:26:49 WLB vn5dda55xibp1t55zaju... EXCEPTION :
25/10/2007 17:08:18 WLB w0pmub55asmrry552ki4... EXCEPTION :
25/10/2007 18:06:13 ISE ERROR: Error
[1] [2] [3]
Number of pages: 3
Total number of records: 109

Initially, records are filtered according to the settings on the View Settings tab so that, for example, you may see only records from certain files and for certain dates. Within these restrictions, you can request records from a selected machine only and can filter the records using an SQL query. This allows you, for example, to select only records that are flagged as belonging to a particular project, or that relate to events between noon and 5pm on a certain day. The default is to display all records logged at the Info, Warning, Error, or Fatal logging levels and to sort them in ascending date and time order. If you want more information about logging levels, refer to

To View Log Records

- Select the View Logs tab.
- In Machines, choose the machine whose log records you want to see.
- In SQL query, type the query you want to use for selecting and displaying records.
- Click View Logs.
- If there is more than one page of records, use the buttons and links below the list frame to see those pages. If there are no records that match your selection criteria, the words “No records” are displayed.

▶ To see the full text of an error message without scrolling, click the message text and it will be displayed in a pop-up dialog box.

Downloading Log Files

If there are problems with your installation that you cannot solve, you may be asked to send the log files to your SPSS support representative. The easiest way to do this is to use the Download tab to create a zip (compressed) file that you can then send by email.

The download process copies all files that were created on or after a given start date or that were last modified on or before a given end date. When choosing dates, remember that some files grow more quickly than others so you may need to extend the date range outside the period when the problem actually existed. The download process also creates a ReadMe file containing information related to the problem. You provide some of this information and some comes from DPM.

Zipped files are named *SiteName*_yyyy–mm–dd.zip (for example, BJH_2007–10–26.zip). Once the file has been created, Manage Logs displays a standard Windows download message box asking whether you want to open or save the file.

The date range, the file types downloaded, and the setting for Windows event files are saved in DPM as application settings so that they become the defaults the next time you run Manage Logs.

Notes

- Although downloading is usually quite fast, it may take some time if you download a lot of very large log files or you download Windows event logs. You will not be able to use IBM® SPSS® Data Collection Interviewer Server Administration while the download is in progress.
- If you have a number of people with administrator privileges, only one of those users can download log files at a time.

To Zip and Download Log Files

▶ Select the Download Logs tab.

▶ In Machines, choose the machines whose log records you want to download.

▶ In Log file types, choose the types of log files you want to download:

Select	For
IBM® SPSS® Data Collection Interviewer Server (ISE)	Records related to the interview engine.
Interviewer Server Components (IVW)	Records related to interviews.
Others	Records from log files for other activities such as Participants or Export Data. Select the appropriate log files from the list (Shift+Left Click or Ctrl+Left Click).

▶ In Log files date filter, choose the date range you want to see. Possibilities are the last two, 12, or 24 hours, the last two days, the last week, or the latest (the last modified log file for each selected log file type). The default is the last two days. If you would rather specify your own date range, select Custom and then choose the start and end dates in the new fields that Manage Logs displays.

Note: The date range applies to the creation and last modified dates of the log files themselves, not to the dates that the log entries were written. On a lightly loaded system this may mean that some files contain information that is not relevant to the current issue.

- Select Include windows event logs? if you want to download the Windows system and application logs. The default is to download these files as they often contain useful information about what has been happening on a machine while Interviewer Server Administration has been running.
- Select Use regular expression to filter? if you want to define a regular text expression upon which to search. When selected, you can enter a text expression in the provided field. Only log files that contain the defined text will be returned.
- Use the check boxes in the ReadMe content section to specify information to be added to the ReadMe file that is created to accompany the log files.
  - In Priority, select the job's importance to you.
  - In Contact details, type the name and telephone number or email address of the person that the support representative should contact about the problem.
  - In Description of problem, type a clear and concise description of the problem that has been observed. If you have other information that will be helpful, make a note of it here. For example, if a sample management script has recently been changed or the problem occurred after a system upgrade, add it to this field so that the support representative is aware of the issue.
- Click Download Logs.

What's in the Zip File

The zip file that Manage Logs creates contains the following files in the order shown:

Filename	Description
dpm_out.txt	A text file listing the contents of DPM.
ReadMe.html	Additional information about the files.
ApplicationEvents.csv SystemEvents.csv	The Windows application and system event logs, if requested.
*.tmp	IBM® SPSS® Data Collection log files. The exact files depend what was requested.

The ReadMe File

The *ReadMe.html* file contains the following information:

- When the zip file was created and by which version of the log tool.
- Which versions of IBM® SPSS® Data Collection Interviewer Server Administration and its associated applications are installed.
- The names of the machines whose log files have been included, the function of each machine in the cluster (interviewing server, for instance), each machine's time zone, and how many log files have been collected from each machine.
- Information that you entered on the Download tab.

If you need to amend the problem description, you may do so by editing the file and saving it back into the zip file. There is no need to rerun the download simply for this.

IBM SPSS Data Collection Remote Administration

The IBM® SPSS® Data Collection Remote Administration activity allows you to monitor the remote interviewers working on a given project. Remote Administration is the server component of IBM® SPSS® Data Collection Interviewer, which remote interviewers use to conduct interviews and synchronize their data.

The Remote Administration activity provides status information on each remote interviewer, including the number of interviews completed, the number of suspended interviews, and the last time the interviewer synchronized.

Starting the IBM SPSS Data Collection Remote Administration Activity

- Select the project you want to monitor and click IBM® SPSS® Data Collection Remote Administration.

The IBM SPSS Data Collection Remote Administration Interface

The IBM® SPSS® Data Collection Remote Administration interface provides status information on each remote interviewer for the selected project.

Figure 1-76
The IBM SPSS Data Collection Remote Administration interface

Monitoring
The table below is an overview of the interviewers currently logged in.
To monitor an interviewer directly, select him or her in the list and click the monitor button
Automatically refresh the table every 30 sec.
Select interviewers to display:
Display All
Display Selection
Real Time Display
Interviewer Id
Description
Completed
Suspended
Successful Sync
Attempted Sync
U1 0 0 11/25/2007 12:26:05 PM 11/25/2007 12:26:05 PM
peng1 1 6 11/26/2007 10:28:26 AM 11/26/2007 10:28:26 AM
doc1 user for MI doc team 0 0 11/26/2007 10:58:23 AM 11/26/2007 10:58:23 AM

Interviewer Id. The IBM® SPSS® Data Collection Interviewer Server Administration user ID of the interviewer.

Description. The Interviewer Server Administration description of the user.

Completed. Number of interviews the interviewer has completed on the selected project.

Suspended. Number of interviews the interviewer has started but not completed on the selected project.

Successful Sync. Date and time of the last successful synchronization by the user.

Attempted Sync. Date and time of the last attempted synchronization by the user.

Activation History

The Activation History activity allows you to monitor project activation status. The activity provides options for viewing pending and completed activations and creating activation history filters. The activity is composed of the following tabs:

- Activation History Tab – allows you to view the status of both pending and completed activations.
- Filters Tab – provides options for filtering questionnaire activation history.

Activation History Tab

The Activation History tab allows you to view the status of both pending and completed activations.

Note: In general, you are limited to viewing only your activations.

Activation Report

Displays the status for each activation request.

Pending Activations

The following information is provided:

- **Project** – The project name as it appears in IBM® SPSS® Data Collection Interviewer Server Administration.
- **Status** – The project activation status (pending, processing, success, or failed).
- **Server** – The name of the server to which the questionnaire is being activated.
- **User** – The name of the user who initiated the activation.
- **Submitted** – The time at which the questionnaire was submitted for activation. This is the time as reported by the IBM® SPSS® Data Collection Interviewer Server.

Completed Activations

The following information is provided:

- **Project** – The project name as it appears in Interviewer Server Administration.
- **User** – The name of the user who initiated the activation.
- **Server** – The name of the server to which the questionnaire is being activated.
- **ProcessingServer** – The server that performs the activation. In a cluster environment, the server to which an activation is submitted is not necessarily the server that performs the activation.

- **StartTime** – The time at which the questionnaire was submitted for activation. This is the time as reported by the Interviewer Server.
- **EndTime** – The time at which the questionnaire completed activation. This is the time as reported by the Interviewer Server.
- **Status** – The project activation status (pending, processing, success, or failed).
- **Test Link** – The URL for the activated, test questionnaire.
- **Link** – The URL for the activated, live questionnaire.

▶ You can click the refresh icon to update the activation status:

Removing pending activations

▶ Select the appropriate project from the Pending Activations list.

▶ Click the delete icon to remove the selected project from the Pending Activations list.

Note: You cannot remove activations initiated by other users. You can only remove your own activations.

Filters Tab

The Filters tab provides options for defining how activations are displayed on the Activation History tab.

Activation type. Displays the status for the current activation. When applicable, the drop-down list allows you to select which activation types display on the Activation History tab. Options include:

- All
- Activate – the activation history for activations submitted via the IBM® SPSS® Data Collection Activation Console.
- Launch – the activation history for activations submitted via the IBM® SPSS® Data Collection Interviewer Server's Launch activity.
- Promote – the activation history for activations submitted via the Interviewer Server's Promote Project activity.

Activation history. The drop-down list allows you to select which activations display in the Activation History tab. Options include:

- All
- Successful activation
- Failed activation

Activation status. The check boxes allows you to select the activation status to display in the Activation History tab. Options include:

- Active

- Inactive
- Test

Project. Allows you to define specific projects to display in the Activation History tab.

▶ Click Find to locate questionnaire projects on the Interviewer Server.

▶ Use the Add>> and <<Remove buttons to select which projects will display in the Activation History tab.

User. Allows you to define projects, activated by specific users, to display in the Activation History tab.

▶ Click Find to locate users on the Interviewer Server.

▶ Use the Add>> and <<Remove buttons to select which users' projects will display in the Activation History tab.

Activation date between. Allows you to select an activation date range. Only activations that occurred between the specified date will display in the Activation History tab.

▶ Click Apply to save your settings.

Desktop Tools

IBM® SPSS® Data Collection Interviewer Server comes with some programs that can only be run from your desktop. These are:

- Quota Setup for creating a quota database and defining quotas.
- Activate Console for activating projects from a batch file or from the command line.

Activating Projects from the Command Line

You can activate projects from the command line. This is useful in the following circumstances:

- You want to activate a number of projects, but do not want to have to wait while each one is activated.
- You want to activate to a number of clusters or servers.
- You want activation to run unattended and/or at some time in the future.

The Activate Document

Activation from the command line uses an Activate Document that specifies how the project is to be activated. It contains the same information as you would normally enter using the Activate dialog box in IBM® SPSS® Data Collection Base Professional, but in XML format. This means that if you have a number of projects with identical or similar activation requirements, you can create the Activate Documents by copying and editing an existing file.

The easiest way to create an Activate Document from scratch is to fill in your requirements on the Activate dialog box and then save the specification to a file, optionally without activating the project at all.

If you have pre-version 2.3 activation *.ini* files, you can convert them into Activate Documents by running the ActivateIniToXml tool.

If you create a new Activate Document by copying and editing an existing one, you need to check the settings that specify whether activation is over the local network or across the internet. These settings are as follows:

```
<?xml version="1.0"?>
<Activate usewebservice="False" webserviceurl="">
   <ActivateSettings>
      <Sites>
         <Site dpmservername="MyDPMServer" username="" userticket="">
            ...
         </Site>
      </Site>
   </ActivateSettings>
</Activate>
```

This example is set up for activation over a local network. To activate across the internet, change `usewebservice` to True and `webserviceurl` to the URL for IBM® SPSS® Data Collection Interviewer Server Administration on the destination server.

If `dpmservername` is not defined, it defaults to the DPM server set on the machine running the accessories service.

Activating Projects

You activate projects from the command line by running the Activate program in either console or dialog box mode. In both cases you will need to run the command from *C:\Program Files\Common Files\IBM\SPSS\DataCollection\6\\Interviewer Server\5.6*.

In console mode, activation is based solely on the contents of the Activate Document named on the command line, and is ideal for activating remotely or on an unattended machine. To activate in this mode type:

activate -a "*actdoc***"** [**-u** *username*] [**-t** *ticketname*] [**-r**] [**-c**] [**-l**] [**-?**]

Optional parameters are as follows:

Option	Description
–a *"actdoc"*	Names the Activate Document.
–u *username*	The user name to use for activating the document. If none is specified, the activation process will use the name specified in the Activate document. (It is recommended that names are not stored in Activate documents.) If there is no name or user ticket specified in the Activate document, the activation process attempts to log in as a trusted Windows user.
–t *ticket*	The user ticket to use for activating the document. (It is recommended that tickets are not stored in Activate documents.) This option is valid for command-line activation only.
–r	Display a progress box.
–c	Write information to the screen.

Option	Description
–l	Display a login dialog box.
–?	Display help.

In dialog box mode, Activate displays a dialog box in which you specify the activation parameters (this is the mode in which Activate runs in IBM® SPSS® Data Collection Base Professional). You can include options on the command line that pre-populate the dialog box with certain types of information, such as the project name or interview script type. When you have completed the dialog box, click Activate to start activation. This mode is ideal for creating new Activate Documents. To activate in this mode type:

```
activate -g [-p proj_ID] [-s script_type] [-f "foldername"] [-d DPMservername]
[-w webservice URL] [-l] [-?]
```

Optional parameters are as follows:

Option	Description
–g	Displays the Activate dialog box. Use this option when you want to create an Activate document. If this option is not present, `-a` is required.
–p *project_id*	The project ID.
–s *script_type*	Interview script type. Must be set to IBM® SPSS® Data Collection.
–f *"foldername"*	Pathname of the project's source folder.
–d *DPMservername*	Names the initial DPM server.
–w *web-service URL*	Activate via the web-service URL. For example: http://<servername>/spssmr/activatewebservice/activatewebservice.asmx
–l	Display a login dialog box.
–?	Display help.

Example Activation Commands

The following command displays the Activate dialog box:

```
activate
```

The following command activates using the *myactdoc.xml* Activate Document:

```
activate -a "c:\myactdoc.xml"
```

The following command activates using the *myactdoc.xml* Activate Document and writes any output to the *log.txt* file:

```
activate -a "c:\myactdoc.xml" > log.txt
```

The following command activates using the *myactdoc.xml* Activate Document but displays a login dialog box before activation starts.

```
activate -a "c:\myactdoc.xml" -l
```

The following command displays the Activate dialog box with the Project Id field containing "museum" and the Source Files field containing "c:\myprojects\museum":

```
activate -g -p museum -f "c:\myprojects\museum"
```

The following command displays help:

```
activate -?
```

Converting Activation .ini Files to .xml Format

If you used command line activation prior to version 2.3 and you want to reuse the activation .ini files with Activate, you can convert them using the ActivateIniToXml tool. Go to the folder called C:\Program Files\Common Files\IBM\SPSS\DataCollection\6\Interviewer Server\6.0.1.0.0 and type:

ActivateIniToXml -i "*ini_filename***" -x "***xml_filename***"**

For example:

```
ActivateIniToXml -i "c:\mrproject\myproject.ini" -x "c:\mrproject\myproject.xml"
```

If you forget the command syntax, type:

```
ActivateIniToXml -?
```

for a reminder.

Chapter
2

IBM SPSS Data Collection Quota Setup

You use the IBM® SPSS® Data Collection Quota Setup program to define the quota categories and targets that you want to use for a project. Quota Setup provides the following features:

- **Questionnaire and sample variables**. Quotas can based on categorical, numeric, and text variables from the questionnaire script, as well as on variables present in the sample data.
- **Independent quotas**. Quotas based on a single variable such as gender, age, region or preferred brand. Independent quotas are also known as one-dimensional quotas.
- **Dependent quotas**. Quotas based on a combination of between two and six variables. For example, a dependent quota for gender and age will define targets for gender and age combinations such a male aged 18 to 24, male aged 25 to 34, female aged 18 to 24, and so on. Dependent quotas are also known as multidimensional quotas.
- **Over quota cells**. When a target has almost been met and there are several interviews running that belong in that cell, you can allow those interviews to continue even though the target will be exceeded if all those interviews complete successfully. Interviews that start after the target has been met will be terminated in the usual way.
- **Counter quotas**. Interviews may be counted for a cell without the cell being used for quota control. You can use this type of quota for *null, dk, ref* and Other Specify categories where quota control is not required.
- **Table or expression quotas**. Quotas may be defined in tabular form or in text form using an expression builder.
- **Sample management quotas**. You can define quotas based on variables present in the sample files. Sample data and questionnaire data can be combined in the same quota if required.
- **Block setting of targets**. Groups of quota cells with identical targets and other settings can be preselected, so that the specifications for those cells can be entered once and then applied automatically to each selected cell.
- **Reusing quota files**. Once you have set up a quota file you can reuse it in other projects that have identical quotas.

For further information about the IBM® SPSS® Data Collection Interviewer Server quota control system, refer to "Quota Control" in the Interviewer Server section of *IBM® SPSS® Data Collection Developer Library*.

Starting IBM SPSS Data Collection Quota Setup

IBM® SPSS® Data Collection Quota Setup needs a questionnaire definition (*.mdd*) file in order to run. This tells it which questions are available and what responses each question allows. If the questionnaire has been created using IBM® SPSS® Data Collection Interviewer Server Administration activities, you will need to download the *.mdd* file from the Interviewer Server

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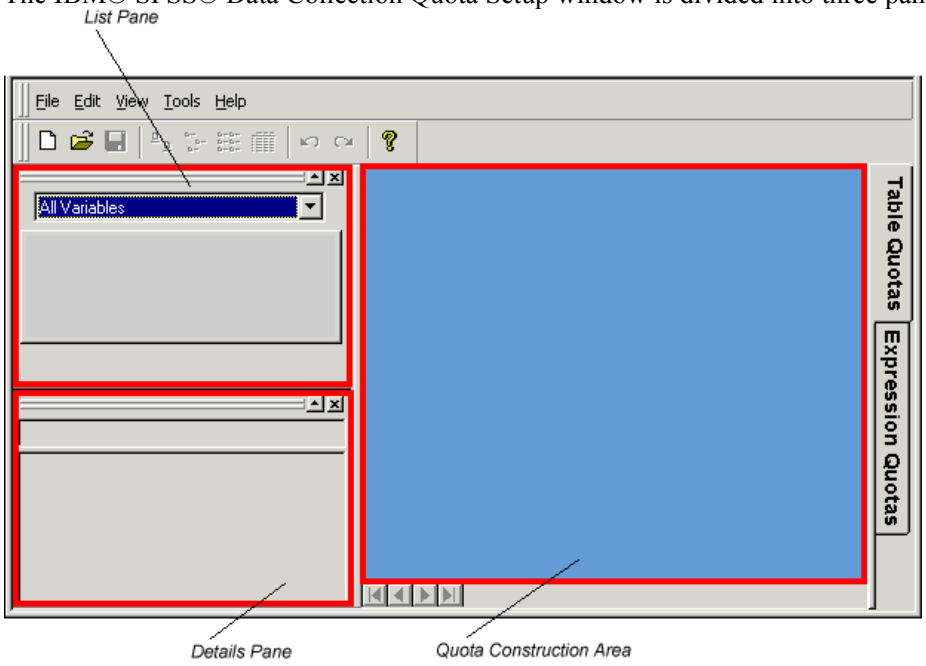
Administration project folder onto your computer. You can do this from Interviewer Server Administration using the Files activity.

- Go to the folder containing the project's *.mdd* file.
- From the Start menu choose:

  Programs > IBM® SPSS® Data Collection > IBM® SPSS® Data Collection Interviewer Server 6.0.1 > Quota

The IBM SPSS Data Collection Quota Setup Window

The IBM® SPSS® Data Collection Quota Setup window is divided into three panes:



The List Pane lists the variables that are present in the project's *.mdd* file. For each variable, you see its name, variable number, data type, and description (question text). You can change the layout of the List Pane so that only icons and names are displayed if this is what you prefer.

The List Pane normally shows only categorical variables as these are the ones most commonly used for quotas, but you can display numeric, text, and boolean variables as well. Quota Setup also hides system variables as these are rarely useful for quota-ing, but you can choose to display system variables if you wish.

The Details Pane lists the categories (responses) in the variable that is currently selected in the List Pane.

The Quota Construction Area is where you define the quotas by dragging in variables from the List Pane and then adding targets.

The List and Details Panes are **undockable**. This means that you can convert them into windows, resize them, and move them anywhere on the screen, even outside the Quota window.

Options in the View menu also allow you to hide components of the Quota window, which can be useful when you have finished defining quotas on a large grid, and you want to see the whole grid on the screen.

Docking/Undocking the List and Details Panes

To Undock a Pane

▶ Double-click the double bars at the top of the pane.

To Dock an Undocked Pane

▶ Double-click the pane's title bar.

Changing the Layout of the List Pane

▶ Click one of the following buttons in the toolbar:

	Display a small icon followed by the variable name.
	Display a list of icons and variable names.
	Display a list of icons and variable names.
	Return to the default, four-column layout.

Displaying All Variable Types in the List Pane

It is less common to define quotas based on numeric and text variables, so the List Pane does not display them unless requested.

To Display All Variable Types in the List Pane

▶ Choose All Variables from the drop-down list at the top of the View Pane.

Displaying System Variables in the List Pane

System variables are created by IBM® SPSS® Data Collection Interviewer Server when you parse the questionnaire, and contain general information such as the interview serial number, the date and time at which the interview started, and the name of the last question that the respondent answered. As such, they are not normally useful for quota control and do not appear in the standard list of variables.

To Display System Variables in the List Pane

▶ Choose:
View > View System Variables

Displaying Sample Variables in the List Pane

When your sample records contain personal data such as age, gender, or brand tried, you can apply quotas based on this data either in the sample management authentication script or in the questionnaire script. For example, you could set up sample management quotas that restrict the

survey to 500 men and 500 women, and then apply quotas in the script based on age or brand tried once respondents have started the interview.

You can create quotas based on variables in the sample records. Once you have told IBM® SPSS® Data Collection Quota Setup to make the sample variables available (they appear on a separate tab in the List pane), the procedures for using them to build quota definitions are the same as for questionnaire variables.

Quota Setup cannot use the sample information directly from the sample files so it creates a separate *.mdd* file for them in the same location as the project's *.mdd* and *.mqd* files. The new file is called *tablename*_sm.mdd, where *tablename* is the name of the sample table containing the sample records.

Note: Most sample variables are not categorical variables and would not normally be visible in the List Pane, so Quota Setup automatically selects the option to display all variable types in the List Pane when you display sample management variables.

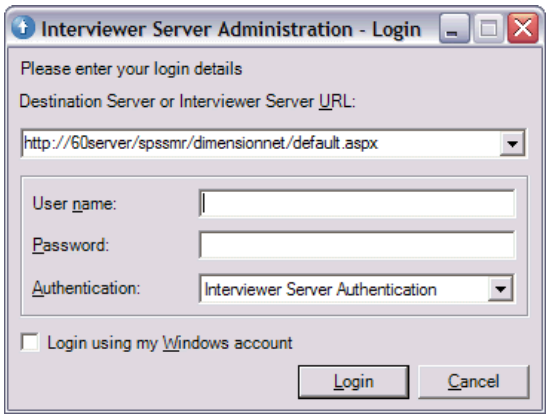
To Display Sample Variables in the List Pane

▶ Choose:

File > Open Sample Management

This opens the IBM® SPSS® Data Collection Login dialog box.

Figure 2-1
Login dialog box



▶ Enter your login details.

If you are connected to your local network:

- Enter or select the name of the project management (DPM) server on the cluster to which the database server belongs. The first time you use this login dialog, the server's name is shown as localhost. Thereafter, it shows whatever machine name you entered the last time you logged in.
- Choose whether you will log in using your IBM® SPSS® Data Collection Interviewer Server Administration user name and password or your standard Windows account, and enter a user name and password if required.

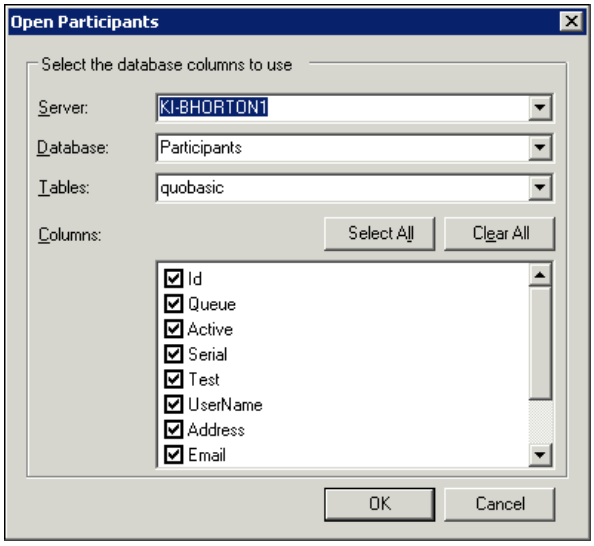
If you are not connected to your local network, you can log in over the internet:

- Enter the URL for Interviewer Server Administration on the cluster.
- Enter your Interviewer Server Administration user name and password. This type of connection does not support Windows logins.

▶ For both types of connection, click Login. A message reports whether or not you are successfully logged in.

This opens the Open Participants dialog box.

Figure 2-2
Open Participants dialog box



The defaults for Server, Database, and Tables are set using information in the project management database (also known as DPM), as follows:

Server. If there is a project in DPM with the same name as the current *.mdd* or *.mqd* file and that project references a sample management object, then the value set in the sample management property Queueing>Queues>Properties>INIT_DATASOURCE is used as the server name. Otherwise, the value of the DPM site property INIT_DATASOURCE is used.

Database. If there is a project in DPM with the same name as the current *.mdd* or *.mqd* file and that project references a sample management object, then the value set in the sample management property Queueing>Queues>Properties>INIT_catalog is used as the server name. Otherwise, the Database box is empty.

Tables. If there is a project in DPM with the same name as the current *.mdd* or *.mqd* file and that project references a sample management object, then the value set in the sample management property Queueing>Queues>Properties>Table is used as the server name. Otherwise, the Tables box is empty.

▶ In Server, choose the name of the database server you want to use.

▶ In Database, choose the name of the participants database.

- In Table, choose that name of the table that holds the project's sample records.

  The names of the columns in the table appear in the Columns box.

- In Columns, choose the variables that you want to use for quotas. The default is to make all sample variables available. (It may be quicker to click "Clear all" and then select the columns you want to use rather than canceling unwanted columns individually.)

- Click OK.

Hiding Components of the IBM SPSS Data Collection Quota Window

- Choose one or more of the following from the View menu:
  List Pane. Show/hide the List Pane. Clicking the X button in the top right-hand corner of the pane also hides the pane.
  Details Pane. Show/hide the Details pane. Clicking the X button in the top right-hand corner of the pane also hides the pane.
  Default Layout. Return the window to its default appearance.
  Main Toolbar. Show/hide the main toolbar.
  Status Bar. Hide/show the status bar at the foot of the window.

Creating and Opening Quota Files

IBM® SPSS® Data Collection Quota Setup obtains its information about a project's variables from the *.mdd* file and saves the quota definitions you create in a file with an *.mqd* extension.

Note: If quotas exist for a project, you should always work on the *.mqd* file rather than the *.mdd* file. If you open an *.mdd* file when a *.mqd* file exists, Quota Setup will overwrite the original contents of the *.mqd* file rather than adding the new quotas you have just created.

To Create a New Quota Definition File

- Choose:
  File > New

  This opens the Open dialog box.

- Navigate to the project's source folder and choose the project's *.mdd* file.

- Click Open.

  The List Pane displays the names of the project's categorical variables, and the Quota Construction Area is prepared for defining quotas.

To Open an Existing Quota Definition File

- Choose:
  File > Open

  This opens the Open dialog box.

- Navigate to the project's source folder and choose the project's *.mqd* file.

▶ Click Open.

The List Pane displays the names of the project's categorical variables, and the Quota Construction Area shows details of the existing quotas.

Undoing and Redoing Actions

IBM® SPSS® Data Collection Quota Setup keeps track of the drag and drop actions that you take during a session and the order in which you take them, and allows you to roll back or reinstate the changes one at a time.

When using Undo and Redo, bear in mind the following points:

- Once you add targets to a quota table, Quota Setup forgets about the individual changes you made up to that point and treats all actions on that table up to and including the addition of the targets as a single step. For example, if you add a new table with two dimensions and then add targets, clicking Undo removes the second variable and the targets, and clicking Undo a second time removes the first variable; clicking Redo reinstates the first variable and then the second variable and the targets. You cannot undo the targets by themselves or undo the addition of the second variable.
- Saving changes to a table does not prevent you from undoing them.
- You cannot undo the addition of a new table: delete the table instead.
- Undo and Redo are disabled for Expression Quotas.

To Undo Actions

▶ Choose:
Edit > Undo

▶ Repeat this step to undo the previous change, and so on. When there are no more changes to undo, Quota Setup makes the Undo feature unavailable.

To Reinstate Undone Actions

▶ Choose:
Edit > Redo

▶ Repeat this step to reinstate other actions that you undid in the order in which the actions were originally taken. When there are no more actions to redo, Quota Setup makes the Redo feature unavailable.

Choosing Your Working Language

When you work on a multilingual project, IBM® SPSS® Data Collection Quota Setup displays question and response texts in the project's base language. If you would prefer to work in one of the project's other languages, you may do so.

To Choose Your Working Language

- Choose:
  Tools > Language

  This opens the Select Language dialog box.

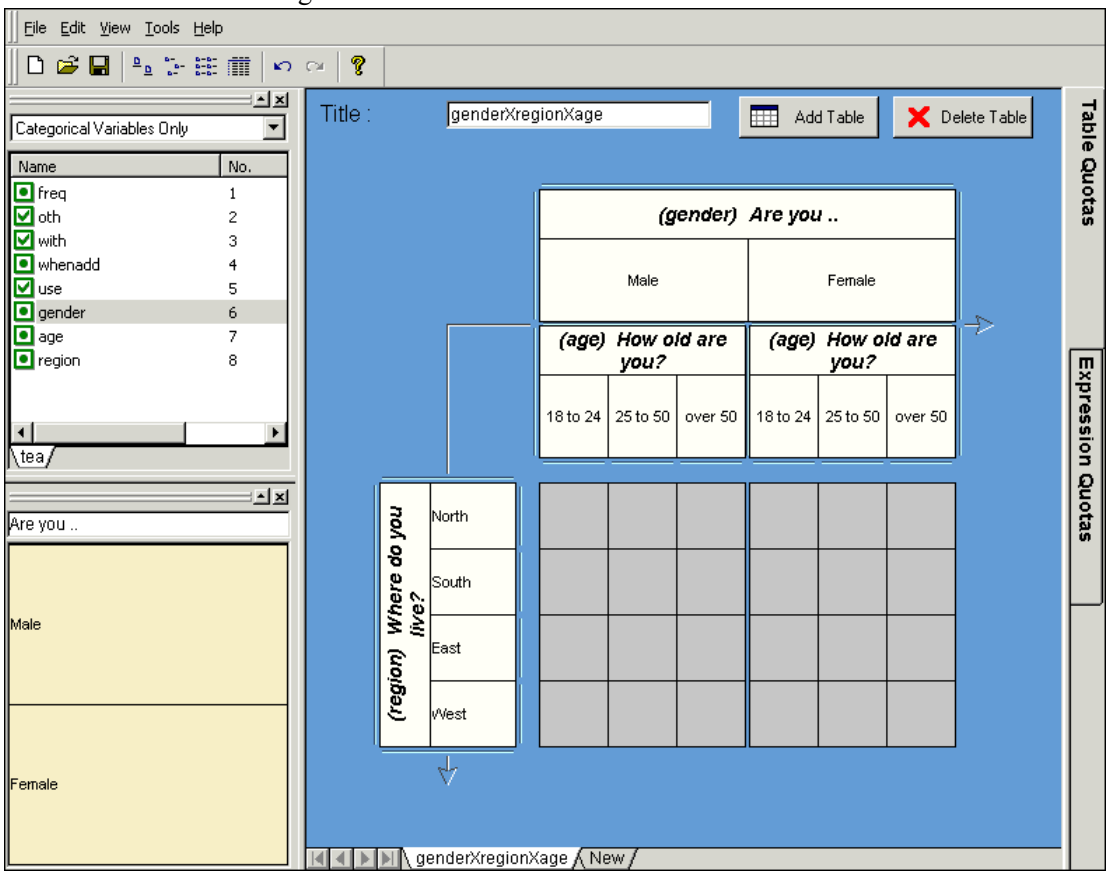
- In Language, choose a language from the drop-down list.

- Click OK.

Table Quotas

The easiest way of defining quotas for categorical variables is to use the Table Quota tab. Using this method, you define the quota dimensions and structure by dragging variables from the List Pane into the Quota Construction Area. The position of the variables in the Quota Construction Area determines the characteristics of each quota cell.

The following illustration shows a three-dimensional quota of gender by region by age in which each cell will contain a target for a different combination of those three characteristics:



As you build the quota table, IBM® SPSS® Data Collection Quota Setup prepares a grid in which you can enter the targets and other settings for the various cells.

Note: Table Quotas are available for script variables only. If you are defining quotas for Sample Management variables, you must define them as Expression Quotas.

Defining Table Quotas

- In the List Pane, choose one of the variables that forms part of the quota you are defining, and drag it onto one of the drop lines in the Quota Construction Area. You will know when you have the variable in the right place because the drop line will turn pink.

  The variable's name and categories appear on the drop line, and an empty grid appears in which to define the targets.

- If you are defining a two-dimensional quota, drag the second variable from the List Pane into the Quota Construction Area, but this time drop it on the other line.

  The variable's name and categories appear on the drop line and additional cells are added to the target grid.

- If you are defining a quota with more than two dimensions, drag the additional variables to the appropriate positions relative to the other variables in the grid. You can place the new variables above, below, and to the left or right of existing variables, but in the context of defining quotas, the most logical positions are above or below the top variable and to the left or right of the side variable.

- When the structure of the quota grid is complete, you can start defining targets. Select one or more cells in the target grid, as follows:

To Select	Do the following
A single cell	Click in the cell. (Double click to select the cell and open the Quota information dialog box all in one go.)
A number of nonadjacent cells	Hold down the Ctrl key and click on each cell in turn.
All cells in a row	Position the cursor over a cell in that row, right-click and choose Select Row.
All cells in a column	Position the cursor over a cell in that column, right-click and choose Select Column.
All cells in the grid	Position the cursor over any cell, right-click and choose Select Table.

  The selected cells turn blue and are the ones that will be affected by your next actions.

- Right-click and choose Edit from the pop-up menu.

  This opens the Quota information dialog box.

- In Quota target, type the target for the selected cell or cells.

- Optionally, click Allow Over Quota if you want to allow interviewing to continue all the time that the number of completed interviews in this cell is less that the target. Once the target is met, any interviews that were already in progress will be allowed to continue and complete, so it is possible that the final number of completed interviews will slightly exceed the target. Once the target has been met, all new interviews in the cell will fail the quota test and will be dealt with as specified by the scriptwriter (usually the interview will be terminated).

- Optionally, click Counter Quota to count the number of interviews that take place for these cells without specifying targets. These cells will then have no quota control, but a record of the number of interviews achieved for each cell will be maintained.

- Click OK to close the dialog box.

  The quota table is updated to show the targets for each cell. The symbol in the top right-hand corner of each cell shows the quota type: N for a normal quota, an up-arrow for allow over quota, and C for a counter quota.

- Repeat these steps until you have defined a target for each cell.

- In Title, replace the default title with something that describes the quota.

  The scriptwriter may use the title that you define to identify the quota in the script. It is therefore a good idea to replace the default title that IBM® SPSS® Data Collection Quota Setup provides with a title that reflects the content of the quota because this will make the script easier to follow.

- To save the definition choose:
  File > Save

  Note: You must give the *.mqd* file the same name as the project and save it in the project's source directory otherwise the activation process will fail when the scriptwriter tries to activate the project.

Creating More Than One Table Quota

You can create as many quota tables as you need, based on different questions or combinations of questions in the questionnaire. In a soft drinks survey, for example, you may want to have one quota based on age and gender and then, further on in the questionnaire, a quota based on the type of soft drink that respondents usually drink.

- Either click Add Table or choose the New tab at the foot of the Quota Construction Area.

- Select the quota variables and define the targets. For more information, see the topic Defining Table Quotas on p. 316.

Deleting Table Quotas

- Choose the tab for the quota you want to delete.

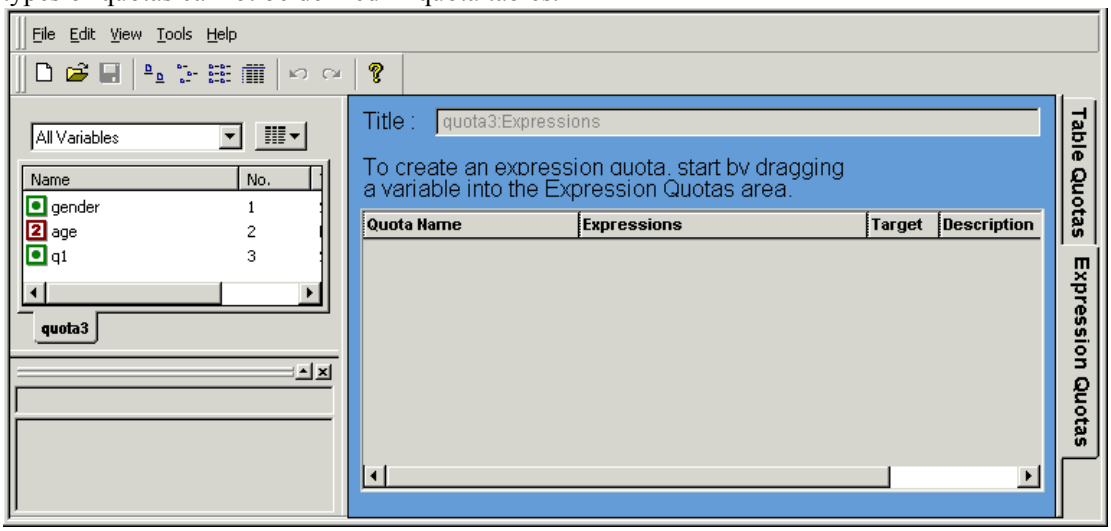
- Click Delete Table.

- Confirm your request when prompted to do so.

  *Note:*Deleting quota tables from IBM® SPSS® Data Collection Quota Setup does not delete the tables from the Quota database. Instead, the tables are flagged as Inactive, so that they are ignored by the quota control system.

Expression Quotas

The Expression Builder lets you define quotas by creating expressions that describe the characteristics of each quota. You can create Expression Quotas using any types of variables, but they are particularly useful for quotas based on numeric, text, or boolean variables, because these types of quotas cannot be defined in quota tables.



To understand more about how Expression Quotas work, consider a simple Table Quota for gender. The expression that describes the cell for men is that the gender variable should contain 'Male'; the expression for the cell for women is that gender should contain 'Female'. If you wanted, you could replace the Table Quota for gender with two Expression Quotas using the expressions noted here.

With numeric variables, you can define quotas based on single values or ranges of values. For example, if age is a numeric variable, you can define quotas for people aged 21, people aged 18 to 21, or people who are older than 21.

With text variables, you can define quotas based on words that are present or not present in a variable — for example, people who mention the word 'expensive' when saying why they would not buy a product.

*Note:*Expression Quotas exist only for the characteristics you define. If your expressions do not cover all possible values for a variable, there will be no quotas for the missing values. This is not the same as Table Quotas, where choosing a variable automatically creates quotas for all categories in the variable. For example, if you define a single expression for people aged 35 years and below, there will be no quota for respondents aged over 35 and respondents in this age group will not be checked. This is not wrong, but you may prefer to create a counter quota for these respondents instead.

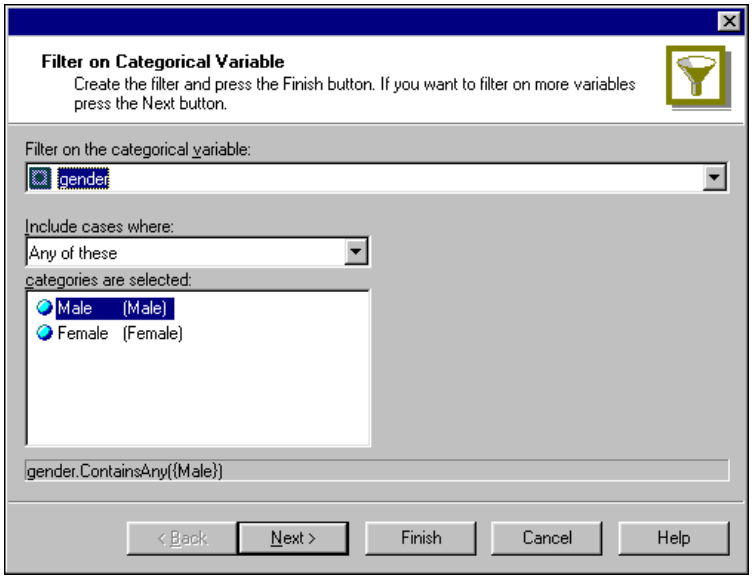
When a quota has more than one characteristic, the expression that defines the quota will consist of a number of sub-expressions, one for each characteristic. So, a quota for young men will consist of two sub-expressions, one for male respondents and the other for young respondents. The two sub-expressions will be linked by an operator that tells the quota system that respondents should be included in the quota only if they have both characteristics. All women and men who are not young will be excluded from the quota.

Note: Although each expression has a unique name, they are normally stored as a single group under one title. This means that the scriptwriter will not be able to choose to check some Expression Quotas but not others, as is possible with Table Quotas. Expression Quotas based on Sample Management variables are stored separately from Expression Quotas based on variables that are present in the script. The default title for Expression Quotas for script data is Expressions, whereas the default title for Expression Quotas for Sample Management data is *tablename*_sm:Expressions, where *tablename* is the name of the sample table in the sample database.

When you choose a variable for quotas, IBM® SPSS® Data Collection Quota Setup displays a Filter On dialog box that prompts you for the information required to create a quota for that type of variable. The content of the dialog box varies according to the variable type.

Filter on Categorical Variable Dialog Box

Figure 2-3
Filter on Categorical Variable dialog box



You can use expressions to define quotas based on categories from single response and multiple response variables, and grid subvariables. For example, you can set up an expression that includes male respondents, or includes respondents who usually drink Assam or Darjeeling tea.

Filter on the categorical variable. Displays the variable that you dragged onto the Expression Quotas tab. To use a different variable, click the arrow and choose another from the drop-down list.

Include cases where. Specifies how to determine whether the categories that you are about to select will be part of the current quota expression.

- **Any of these.** The quota is for respondents who choose at least one of the selected categories.
- **None of these.** The quota is for respondents who do not choose any of the selected categories.
- **All of these.** The quota is for respondents who choose all of the selected categories. Not available for single response variables.

- **Exactly these.** The quota is for respondents who choose all of the selected categories and no others. Not available for single response variables.
- **At least.** The quota is for respondents who choose at least the specified number of the selected categories. Specify the number in the box that appears to the right. Not available for single response variables.
- **At most.** The quota is for respondents who choose no more than the specified number of categories. Specify the number in the box that appears to the right. Not available for single response variables.
- **Between.** The quota is for respondents who choose a certain number of selected categories. Specify the minimum and maximum number of categories in the boxes that appear to the right. Not available for single response variables.

Categories are selected. Select the categories of the variable that define the characteristics of this quota.

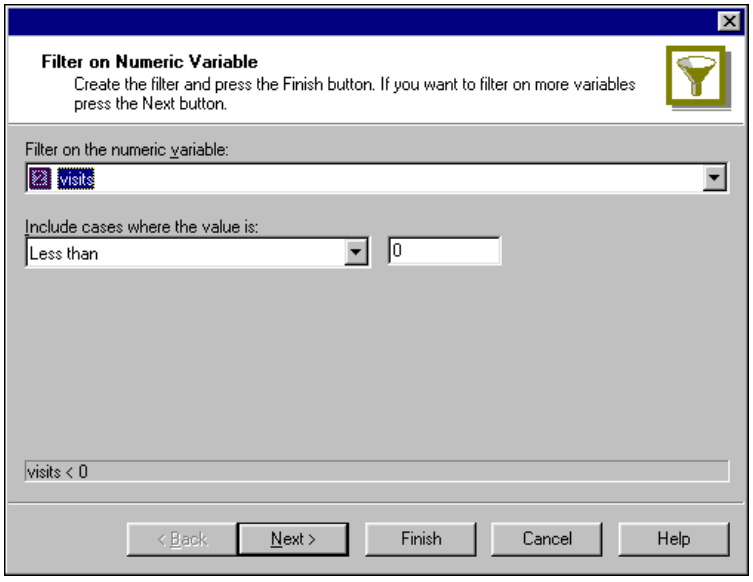
Next. Click to add another variable to the expression.

Finish. Click to close the dialog box.

Cancel. Click to close the dialog box without creating the quota expression.

Filter on Numeric Variable Dialog Box

Figure 2-4
Filter on Numeric Variable dialog box


Filter on Numeric Variable
Create the filter and press the Finish button. If you want to filter on more variables press the Next button.
Filter on the numeric variable:
visits
Include cases where the value is:
Less than
0
visits < 0
< Back
Next >
Finish
Cancel
Help

You can use expressions to define quotas based on values in numeric variables. For example, you can create a quota for people who are under 24 years of age, or you can create a series of expressions for respondents in different age ranges.

Filter on the numeric variable. Displays the variable that you dragged onto the Expression Quotas tab. To use a different variable, click the arrow and choose another from the drop-down list.

Include cases where the value is. Specifies how to determine which respondents belong in this quota. Type an appropriate number in the box on the right.

- **Less than.** The quota is for respondents who give an answer less than the specified value.
- **Greater than.** The quota is for respondents who give an answer greater than the specified value.
- **Equal to.** The quota is for respondents who give an answer that is the same as the specified value.
- **Not equal to.** The quota is for respondents who give an answer that is not the same as the specified value.
- **Less than or equal to.** The quota is for respondents who give an answer less than or equal to the specified value.
- **Greater than or equal to.** The quota is for respondents who give an answer greater than or equal to the specified value.

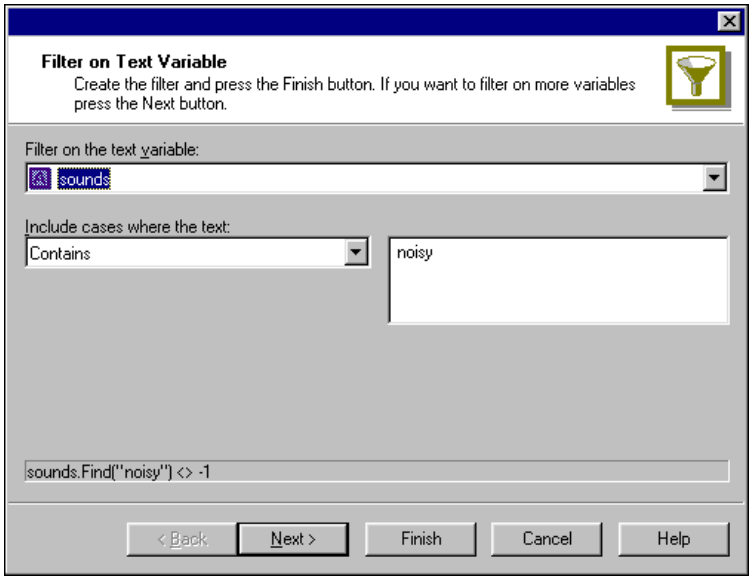
Next. Click to add another variable to the expression.

Finish. Click to close the dialog box.

Cancel. Click to close the dialog box and cancel the expression.

Filter on Text Variable Dialog Box

Figure 2-5
Filter on Text Variable dialog box



You can define expressions that are based on text strings in text variables. For example, you can define an expression that includes respondents who mention the word “noisy” in their answer.

Note: All text expressions are case insensitive. In other words, it does not matter whether you type the text in upper or lower case, because the expression matches the characters in the text and not the case in which they are entered.

Filter on the text variable. Displays the variable that you dragged into the Expression Quotas tab. To use a different variable, click the arrow and choose another from the drop-down list.

Include cases where the text. Specifies how to determine which respondents will be included in the quota. Type the text that defines the quota characteristic in the box on the right.

- **Contains.** The quota is for respondents who mention the specified text.
- **Is exactly.** The quota is for respondents whose answers consist of the specified text and nothing else.
- **Begins with.** The quota is for respondents whose answers begin with the specified text.
- **Ends with.** The quota is for respondents whose answers end with the specified text.
- **Is blank/empty.** The quota is for respondents whose answers are blank or empty. This includes null and silent null responses.
- **Is not blank/empty.** The quota is for respondents whose answers contain any text at all.

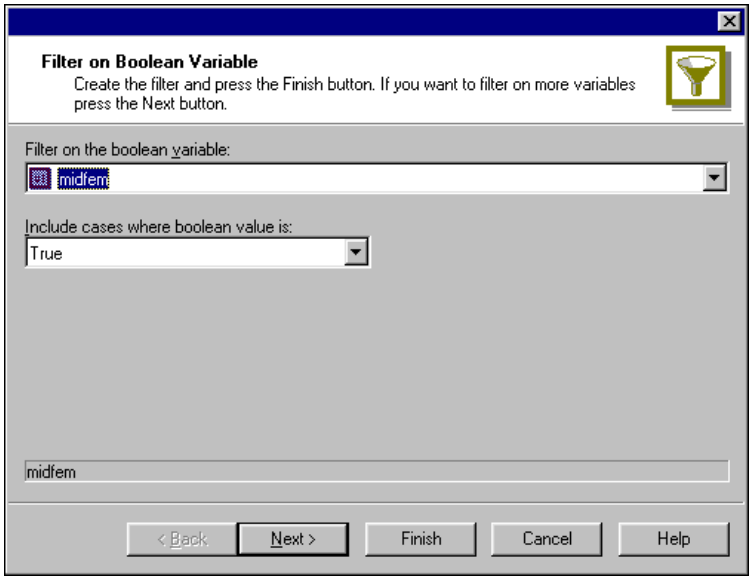
Next. Click to add another variable to the expression.

Finish. Click to close the dialog box.

Cancel. Click to close the dialog box and cancel the expression.

Filter on Boolean Variable Dialog Box

Figure 2-6
Filter on Boolean Variable dialog box


Filter on Boolean Variable
Create the filter and press the Finish button. If you want to filter on more variables press the Next button.
Filter on the boolean variable:
midfem
Include cases where boolean value is:
True
midfem
< Back
Next >
Finish
Cancel
Help

You can define expressions that are based on the values in boolean variables. A boolean variable can contain only one of two values: true or false.

Filter on the boolean variable. Displays the variable that you dragged onto the Expression Quotas tab. To use a different variable, click the arrow and choose another from the drop-down list.

Include cases where the Boolean value is. Choose whether you want the quota to count true or false values.

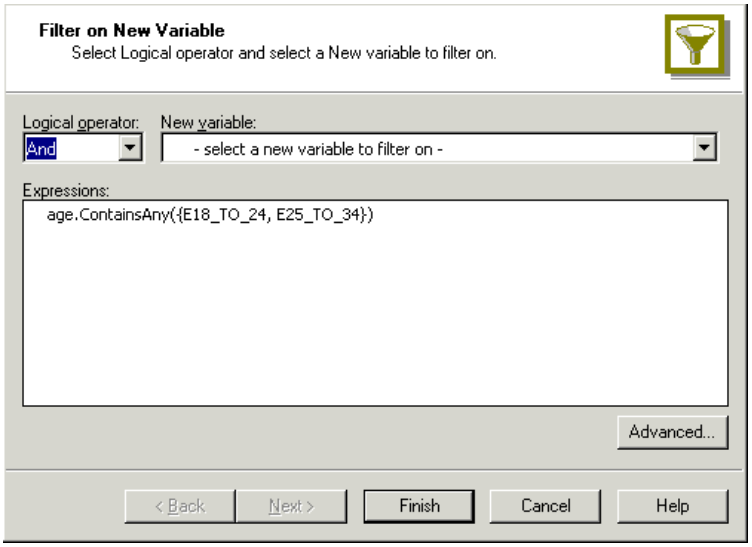
Next. Click to add the values or categories from another variable to the expression.

Finish. Click to close the dialog box.

Cancel. Click to close the dialog box and cancel the expression.

Filter on New Variable Dialog Box

Figure 2-7
Filter on New Variable dialog box



You use the Filter on New Variable dialog box to combine characteristics from multiple variables into a single expression. This dialog box appears when you define a characteristic using a variable and then click the Next button. When you create an expression using multiple variables, you can combine the characteristics using either the `And` operator or the `Or` operator. For example, you could create a quota for respondents who drink Assam tea and who normally make tea using tea bags.

The `And` operator specifies that respondents must have all the listed characteristics. The `Or` operator specifies that respondents must have at least one of the characteristics to be counted towards the quota.

Logical operator. Choose the operator that you want to use to combine the quota characteristics.

New variable. Choose the variable that you want to add to the expression from the drop-down list.

Expressions. Displays the variables and characteristics that you have chosen for the expression.

Defining Expression Quotas

- Choose the Expression Quotas tab.

- Drag a variable from the List Pane onto the Expression Quotas tab.

  This opens the Filter On dialog box. The content of the dialog box varies according to the variable type.

- Define the quota characteristics and selection criteria as described in the following topics:
  - Categorical variables
  - Numeric variables
  - Text variables
  - Boolean variables

- If the expression is based on two or more variables or values, click Next, otherwise click Finish to close the dialog box. For more information, see the topic Expression Quotas using Two or More Variables on p. 325.

  The quota appears on the Expression Quotas tab with a unique name and a default target of 100.

- In Target, type the target you want to set.

- In Type, choose one of the following from the drop-down list:
  - Normal. This is an ordinary quota, so the sum of pending and completed interviews for this quota must never exceed the target. Once the sum of pending and completed interviews for this quota matches the target, all subsequent interviews for this quota will fail. If any of the pending interviews do not complete, further interviews will be required to meet the target.
  - Allow over. Allow the sum of pending and completed interviews for this quota to exceed the target. New interviews may be started for this quota until the number of completed interviews matches the target. If all the pending interviews complete, the target may be exceeded. Once the target has been met, any new interviews for this quota will fail the quota test and will be dealt with as specified by the scriptwriter (usually the interview terminates).
  - Counter. There is no target for this quota so there will be no quota control, but the number of respondents belonging to the quota will be counted.

- In Description, type a short description of the expression.

- To save the definition choose:
  File > Save

  Note: You must give the *.mqd* file the same name as the project and save it in the project's source directory otherwise the activation process will fail when the scriptwriter tries to activate the project.

Defining Quotas for Categorical Variables

When the Filter on Categorical Variable dialog box appears, do the following.

- From the "Include cases where" drop-down list, choose the inclusion criteria for the categories that define the quota characteristics.

- In "categories are selected", choose the characteristics that respondents must have in order to be included in the quota. You can select multiple categories by holding down Ctrl while you click.

Defining Quotas for Numeric Variables

When the Filter on Numeric Variable dialog box appears, do the following:

- From the "Include cases where the value is" drop-down list, choose the selection criteria for this quota.
- In the number box on the right, type the value to which the criteria apply.

Defining Quotas for Text Variables

When the Filter on Text Variable dialog box appears, do the following:

- From the "Include cases where the text" drop-down list, choose the option that defines when respondents will be included in this quota.
- In the box on the right, type the text that defines the quota characteristic.

Defining Quotas for Boolean Variables

When the Filter on Boolean Variable dialog box appears, do the following:

- From the "Include cases where the boolean value is" drop-down list, choose whether you want to include respondents whose values are true or false.

Expression Quotas using Two or More Variables

When the Filter on New Variable dialog box appears, do the following:

- In Logical operator, choose how the sub-expressions are to be combined. Choose And to create a quota expression that requires both sub-expressions to be True; choose Or to create a quota expression that requires at least one of the expressions to be True.
- In New variable, choose a variable from the drop-down list. This list displays all variable types and includes system variables even if you have chosen not to view these variables in the List Pane.
- Define the expression for this variable.
- Click Next to add another sub-expression or Finish to end the expression.

Advanced Expressions

You can define quotas whose characteristics are of almost unlimited complexity using the Expression Definition language. This is based on VBScript and supports all of the VBScript functions. It also includes additional functions that have been designed to meet the needs of the market research industry. For detailed information about the many functions that are available, refer to the Function Library documentation in the IBM® SPSS® Data Collection Developer Library.

When you create a simple expression, IBM® SPSS® Data Collection Quota Setup converts the expression into the Expression Definition language automatically. When you create an advanced expression, you write the expression yourself in the Advanced Filter Specification window, which is designed to make creating expressions easy. The Advanced Filter Specification window has buttons for the operators and functions that you are most likely to use, as well as lists of all of the variables and functions that are available. You can build an expression by choosing variables and clicking operator buttons, by entering the expression directly, or by using a combination of the two approaches.

Expression Syntax

At its most basic, an expression is:

```
Variable Operator Value
```

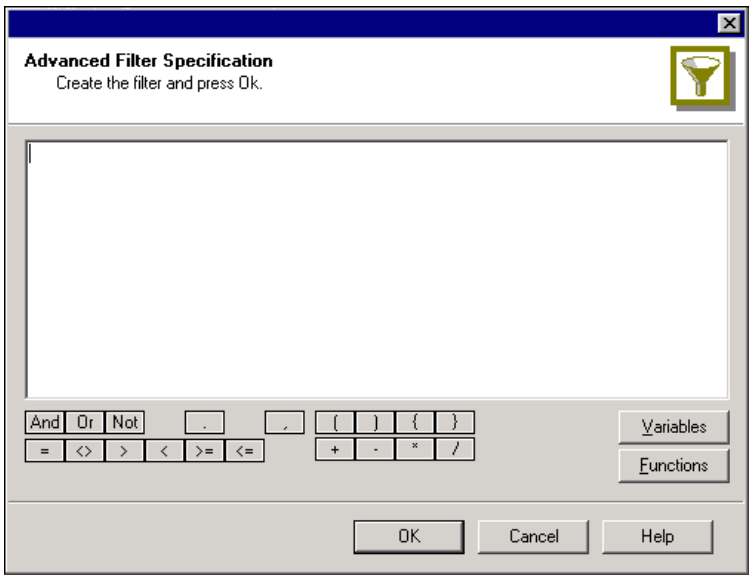
where

- `Variable` is the name of a variable.
- `Operator` is a comparison operator, such as > (greater than) or = (equal to), or one of the functions for selecting respondents on the basis the answers given to a question (variable).
- `Value` is one or more answers held in the variable. You must enclose text values in double quotes—for example, `"noisy"`. You specify values of a categorical variable by defining a comma-separated list of category texts enclosed within braces and parentheses—for example, `({Assam, Darjeeling, China})`. You can specify values from numeric variables as numeric values.

When a quota statement for an Expression Quota is executed during an interview, the expression is evaluated and returns a value of true for a respondent who has the quota characteristics and false for a respondent who does not have the required characteristics.

Specifying Expressions using the Advanced Method

Figure 2-8
Advanced Filter Specification window



You can use the Advanced Filter Specification window to create new Expression Quotas and to modify existing ones.

If you are editing an existing expression, it is displayed in the quota expression box when you open the dialog box. Otherwise, the quota expression box is blank.

You can build Expression Quotas by adding variables and clicking the operator and function buttons. Alternatively, you can enter expressions directly into the quota expression box. In practice, you will probably use a combination of both methods.

Example

If the questionnaire script contains a categorical question called gender, with the categories Male and Female, you can create the following expression to select male respondents:

```
gender.ContainsAny({MALE})
```

To create this expression, you would

- Click the Variables button and choose *gender* from the list.
- Click the . button.
- Click the Functions button and choose ContainsAny from the list that appears.
- Click the { button.
- Choose MALE from the list that appears.
- Click the } button.
- Click the) button.

Note: This example uses a simple expression that could be created using the Filter on Categorical Variable dialog box. However, because it was created using the Advanced method, it can only be edited on the Advanced Filter Specification dialog box.

Comparison Operators in Expression Quotas

When you build an expression, you can use the comparison operators to compare the value in a variable with a specified value of the same type. For example, you can compare the value in a numeric variable with a numeric value and the value in a text variable with a text string. The operators are also valid with other variable types. Refer to the IBM® SPSS® Data Collection Developer Library documentation for more details. The following table lists the comparison operators.

Operator	Meaning	Used with
=	Equal to	Numeric and text variables.
<>	Not equal to	Numeric and text variables.
>	Greater than	Numeric variables.
<	Less than	Numeric variables.
>=	Greater than or equal to	Numeric variables.
<=	Less than or equal to	Numeric variables.

For example:

Expression	Selects
visits > 5	Respondents for whom the visits numeric variable holds a value greater than 5.
visits <= 5	Respondents for whom the visits numeric variable holds a value less than or equal to 5.

Functions

There are many functions that you can use to define Expression Quotas based on values in categorical variables. The functions you are most likely to use for defining quotas are ContainsAny and ContainsAll for quotas based on subsets of responses from a multiple response list, and AnswerCount for quotas based on the number of responses chosen from a list.

For information about the many other functions that are available, refer to the Function Library documentation in the IBM® SPSS® Data Collection Developer Library.

ContainsAny

Use the `ContainsAny` function to define a quota for respondents who have chosen any of a number of listed categories. The categories can belong to a single response variable, a multiple response variable, or a grid subvariable.

The syntax is:

```
variable.ContainsAny({Category1_ID, Category2_ID, ...})
```

Note that the syntax uses the unique ID of the category rather than its label.

For example, you might define the quota expression for young people as:

```
age.ContainsAny({E1720_years, E2124_years})
```

This quota expression counts all respondents in the 17-20 years or 21-24 years categories.

Not ContainsAny

You can use the `ContainsAny` function in combination with the logical operator `Not` to define a quota for respondents who have not chosen any of a number of listed categories. The categories can belong to a single response variable, a multiple response variable, or a grid subvariable.

The syntax is:

```
Not variable.ContainsAny({Category1_ID, Category2_ID, ...})
```

For example, you might define the quota expression for all respondents who are older than 20 years of age as:

```
Not age.ContainsAny({E1116_YEARS, E1720_YEARS})
```

This expression selects all respondents except those in the 11-16 years or 17-20 categories.

ContainsAll

Use the `ContainsAll` function to create a quota for respondents who choose all of a number of listed answers for a multiple response question.

The syntax is:

```
variable.ContainsAll({Category1_ID, Category2_ID ...})
```

Note that the syntax uses the unique ID of the category rather than its label.

For example, you can define a quota for respondents who regularly drink tea and coffee as follows:

```
drink.ContainsAll({Tea, Coffee})
```

Respondents who drink only tea, only coffee, or neither beverage are excluded from the quota.

Note: You can use `ContainsAll` with a single response variable, but you must be careful not to specify more than one category. If you do, the expression will never select any respondents.

All the listed answers and no others

You can use the `ContainsAll` function with the `Exactly` flag set to true to define a quota for respondents who choose all of a number of listed categories from a multiple response question and no others.

For example, you would define a quota for respondents who drink water and nothing else as:

```
drink.ContainsAll({Water}, True)
```

AnswerCount

Use the `AnswerCount` function to define a quota based on the number of answers chosen from a multiple response list.

The syntax is:

```
variable.AnswerCount()numeric condition
```

For example, to define a quota for respondents who can name more than five brands of fizzy drinks:

```
fizzy.AnswerCount() > 5
```

Logical Operators in Expression Quotas

When a quota definition is based on data from two or more variables, you define the overall expression by combining two or more sub-expressions using logical operators. Each sub-expression defines a single characteristic within the quota. For example, a quota for young men is a combination of a gender characteristic and an age characteristic.

Logical operators that join quota expressions are And and Or. The Not logical operator negates expressions.

And

Combine two sub-expressions with the `And` operator when you want to define a quota for respondents who satisfy both sub-expressions.

The syntax is:

```
Expression1 And Expression2
```

For example, you would define a quota for young male respondents as follows:

```
gender.ContainsAny({MALE}) And age.ContainsAny({E1720_YEARS, E2124_YEARS})
```

This expression selects respondents whose gender is male and whose age is either 17-20 years or 21-24 years.

Or

Combine expressions with the `Or` operator when you want to define a quota for respondents who satisfy at least one of the sub-expressions.

The syntax is:

```
Expression1 Or Expression2
```

For example, to define a quota for men of all ages and all women between the ages of 17 and 24, you would specify:

```
gender.ContainsAny({MALE}) Or age.ContainsAny({E1720_YEARS, E2124_YEARS})
```

The gender expression selects all men and rejects all women. The age expression selects anyone aged 17 to 24 and rejects anyone outside that age range. A man passes the gender expression regardless of his age. A woman fails the gender expression but passes the age expression if she is in the specified age group.

Not

Use the `Not` operator when you want to define a quota for respondents who do not have a particular characteristic.

The syntax is:

```
Not Expression1
```

For example, to define a quota for male respondents who are not in the 17-20 or 21-24 age groups (that is, they are younger than 17 or older than 24):

```
gender.ContainsAny({MALE}) And Not age.ContainsAny({E1720_YEARS, E2124_YEARS})
```

Arithmetic Operators in Expression Quotas

You can define quotas in which the quota characteristics are based on the results of arithmetic calculations. The arithmetic calculations consist of numeric variables, numeric values, and numeric expressions all joined by arithmetic operators.

Operator	Operation	Description
+	Addition	Use to add numeric values, numeric variables, or numeric expressions.
-	Subtraction	Use to subtract one numeric value, numeric variable, or numeric expression from another such value, variable or expression.

Operator	Operation	Description
/	Division	Use to divide one numeric value, numeric variable, or numeric expression by another such value, variable or expression.
*	Multiplication	Use to multiply two numeric values, numeric variables, or numeric expressions.

For example, the following expression defines the quota characteristics for respondents who visited the museum more than five times prior to the year the survey was conducted:

```
visits - visits12 > 5
```

visits and *visits12* are both numeric variables. *visits* records the total number of previous visits each respondent made to the museum and *visits12* records the number of visits each respondent made in the previous 12 months. This expression subtracts the number of visits made in the previous 12 months from the total number of visits and selects respondents for whom the result is greater than 5.

Operator Precedence in Expression Quotas

When there is more than one operator in an expression, they are evaluated in a set order, known as the order of precedence. The order of precedence, in evaluation order, is as follows:

- `Not`
- Multiplication and division
- Addition and subtraction
- Comparison operators
- `And` and `Or`

When operators are at the same level of precedence, they are simply evaluated from left to right.

You can override the order of precedence by using parentheses. Operators that are within parentheses are evaluated before operators that are not contained within parentheses. However, when more than one operator is contained within parentheses, they are evaluated according to the normal order of precedence.

Editing Expression Quotas

▶ On the Expression Quotas tab click on the expression you want to change.

An arrow button appears to the right of the expression.

▶ Click the arrow button.

The expression is opened for editing. If the expression is a simple expression based on one variable, the Filter On dialog box for that variable type appears. If the expression contains sub-expressions, the Filter On dialog box for the last sub-expression appears. To access other

sub-expressions you will need to click the Advanced button to view the whole expression in the Quota Expression language.

Deleting Expression Quotas

- On the Expression Quotas tab click the red cross at the end of the line for the Expression Quota you want to delete.
- Confirm your request when prompted to do so.

Reusing a Quota Definition File in Another Project

If you have a number of projects that have quotas based on the same combinations of variables, you can save yourself time by copying an existing *.mqd* file into the new project rather than recreating the file from scratch. A typical example would be when you have a number of projects that all require quotas on the same demographic variables. As long as the demographic variables are the same in all projects, you can create the *.mqd* for one project and then copy it to all the other projects' source directories. If the targets vary between projects, or you want to add extra quotas for some projects, you can edit the copied *.mqd* file to make these adjustments as you would on the original file.

Note: The *.mqd* file contains a number of references to the project name. If you copy *.mqd* files between projects, your first step after copying must be to edit the new file and change these references to point to the new project name. For example, if you copy *cars.mqd* into the travel source directory, you must change its name to *travel.mqd* and then edit it to replace all references to cars with references to travel.

The *.mqd* file is a text file containing XML code so you can edit it using any text editor. Lines in the file are very long, so it is usually best to make the replacements using a global search and replace command. You must be very careful when editing the file because if you make the wrong changes, the file can become unusable.

Chapter 3

IBM SPSS Data Collection Activation Console

The IBM® SPSS® Data Collection Activation Console allows you to monitor questionnaire activation status. The console provides options for viewing pending and completed activations, and creating activation history filters. The console is composed of the following tabs:

- Activation History tab – allows you to view the status of both pending and completed activations.
- Filters tab – provides options for filtering questionnaire activation history.
- Settings tab – provides options for configuring the Activation Console.

When the Activation Console is launched, an icon displays in the Windows taskbar. Whenever a questionnaire is submitted for activation, or completes activation, the icon provides relevant status notification messages. The notification messages include the survey URL link for each completed activation. For more information, see the topic Settings tab on p. 337.

Activation History tab

The Activation History tab allows you to view the status of both pending and completed activations.

Note: In general, you are limited to viewing only your activations.

Pending Activations

The following information is provided:

- **ProjectIcon** – Provides a visual cue for the activation status.

Icon	Description
	Indicates that project files are currently uploading to the server.
	Indicates that the project is pending activation.
	Indicates that project activation is currently in progress.

- **Project** – The project name as it appears in IBM® SPSS® Data Collection Interviewer Server Administration.
- **Status** – The project activation status (pending, processing, success, or failed).
- **Server** – The name of the server to which the questionnaire is being activated.

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- **User** – The name of the user who initiated the activation.
- **Submitted** – The time at which the questionnaire was submitted for activation. This is the time as reported by the IBM® SPSS® Data Collection Interviewer Server.

Select all. Click to select all projects in the Pending Activations list.

Cancel selected. Click to cancel activation for all selected projects.

Completed activations

The following information is provided:

- **ProjectIcon** – Provides a visual cue for the activation status.

Icon	Description
	Indicates that project activation was successful. You can select the appropriate table row and click View Message... to view all activation messages.
	Indicates that project activation failed. You can select the appropriate table row and click View Message... to view related activation error information.

- **Project** – The project name as it appears in Interviewer Server Administration.
- **Status** – The project activation status (pending, processing, success, or failed).
- **Server** – The name of the server to which the questionnaire is being activated.
- **User** – The name of the user who initiated the activation.
- **ProcessingServer** – The server that performs the activation. In a cluster environment, the server to which an activation is submitted is not necessarily the server that performs the activation.
- **StartTime** – The time at which the questionnaire was submitted for activation. This is the time as reported by the Interviewer Server.
- **EndTime** – The time at which the questionnaire completed activation. This is the time as reported by the Interviewer Server.
- **Link** – The URL for the activated, live questionnaire.
- **Test Link** – The URL for the activated, test questionnaire.
- **ProjectId** – The activated questionnaire project's unique ID. The ID is generated by the Interviewer Server.

Refresh. Click to refresh the activation status.

View Messages. Select a completed activation and click to view any messages generated during activation.

Removing pending activations

▶ Select the appropriate project(s) from the Pending Activation section. Alternatively you can select all project by clicking Select all.

▶ Click Cancel selected or right-click and select Cancel.

Note: You cannot remove activations initiated by other users. You can only remove your own activations.

Filters tab

The Filters tab provides options for defining how activations are displayed on the Activation History tab.

Activation type. Displays the status for the current activation. When applicable, the drop-down list allows you to select which activation types display on the Activation History tab. Options include:

- All
- Activate – the activation history for activations submitted via the IBM® SPSS® Data Collection Activation Console.
- Launch – the activation history for activations submitted via the IBM® SPSS® Data Collection Interviewer Server's Launch activity.
- Promote – the activation history for activations submitted via the Interviewer Server's Promote Project activity.

Activation history. The drop-down list allows you to select which activations display in the Activation History tab. Options include:

- All
- Successful activation
- Failed activation

Activation status. The check boxes allows you to select the activation status to display in the Activation History tab. Options include:

- Active
- Inactive
- Test

Project. Allows you to define specific projects to display in the Activation History tab.

▶ Click Find to locate questionnaire projects on the Interviewer Server.

▶ Use the Add>> and <<Remove buttons to select which projects will display in the Activation History tab.

User. Allows you to define projects, activated by specific users, to display in the Activation History tab.

▶ Click Find to locate users on the Interviewer Server.

▶ Use the Add>> and <<Remove buttons to select which users' projects will display in the Activation History tab.

Activation date between. Allows you to select an activation date range. Only activations that occurred between the specified date will display in the Activation History tab.

▶ Click Apply to save your settings.

Settings tab

The Setting tab provides IBM® SPSS® Data Collection Activation Console configuration settings.

Activation status run option. The drop-down menu provides options for determining how the activation console will handle submitted activations:

- **Start Activation Status when activation queued.** The Activation Console begins immediately after activations are added to the queue. This is the default setting.
- **Start Activation Console when my computer starts.** The Activation Console automatically begins when the computer is started.
- **Start Activation Console manually.** The Activation Console is manually started.

Default date range. Controls the date range that displays for the Activation date between fields on the Filters tab.

Activation message range.

Show activation notification. When selected, the Activation Console taskbar icon provides activation notification messages.

Activation auto refresh on/off. When selected, the Activation History tab automatically refreshes based on the Activation auto refresh interval setting.

Play audible notification. When selected, the Activation Console taskbar icon provides audible notifications whenever activation messages are generated. The Play this sound file field allows you to specify a sound file. Click the Browse (...) button to select a sound file.

▶ Click Save changes to save your settings.

Appendix

A

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